FloridaPALM
Planning, Accounting, and Ledger Management

Project Sponsor:	*Steven Fielder*	**Project Director:**	*Jimmy Cox*
Status Report Period:	*June 1, 2024 – June 30, 2024*	**Current Project R&C Category:**	*4*
Project Start Date:	*Project funding began July 1, 2014*	**Project End Date:**	*July 19, 2027* *(Funding appropriated through June 30, 2025)*

1 – FLORIDA PALM STATUS OVERVIEW

A. Agency Engagement
Required for R&C Category

During the month of June, the Department completed the following:
- Published a new edition of the Florida PALM Sponsor Scoop for Agency Sponsors to stay up to date with implementation activities
- Published a new episode of PALMcast featuring the Department of Transportation on the topic of Engaging Managers of End Users
- Published new reports, interfaces, and configurations on the Knowledge Center
- Published 8 resources, as requested from agencies, in the Agency Exchange Library to share knowledge with other agencies in areas of People, Process, Technology, Data, or Project Management
- Continued to meet in person with agencies for Agency Touchpoints
- Continued focused conversations with agencies and enterprise partners in areas of specific importance and personalized support

B. Implementation Status
Required for R&C Category

	Yes	No	Explain:
Is the project on schedule? *If no, explain why and what corrective action(s) are planned to bring the project back on schedule*	✔		Some Project Schedule tasks were trending late during the month of June; however, the late tasks have not impacted Stage Gates and are not impacting the overall implementation schedule for the Project.
Will the project complete on schedule?	✔		The accepted Project Schedule shows Florida PALM going live on January 6, 2026.
Is the project currently within budget? *If no, explain why and what corrective action(s) are planned to bring the project back within budget*	✔		The Project is currently within budget.
Will the project remain within budget?	✔		Spend Plan details provided in section four.

B. Implementation Status			Required for R&C Category	1 2 3 4

|	Yes	No	Explain:
Were any Project Change Requests approved during this reporting period?	✔		Project Change Request (PCR) 118 was approved during this period.
Have any risks or issues impacted the project during the reporting period?		✔	No new risks or issues have been identified.

C. SPI *Provide SPI for Current + Last 3 Reporting Periods*				Required for R&C Category 3 4
	Past Reporting Period	**Past Reporting Period**	**Last Reporting Period**	**Current Reporting Period**
Date	March 2024	April 2024	May 2024	June 2024
Project Schedule Performance Index (SPI)	0.95	0.91	0.94	0.94
Explanation of SPI Variance / Trend	The SPI trend is stable.			

2 – IMPLEMENTATION PROGRESS

A. Stage Gate Decision (Milestones and Critical Path Items)
Provide status tracking for Stage Gate Decisions planned for action by the Project Director and/or Executive Steering Committee and identify the status of each item listed (Completed, In Progress, Future).

Required for R&C Category

Stage Gate Decision Name	Contractual Due Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*
SG1 – Ready to Start Build	12/29/2023	11/8/2023	C
SG2 – Ready to Begin System Testing	8/30/2024	N/A	IP
SG3 – Ready to Begin UAT	3/28/2025	N/A	IP
SG4 – Agency Readiness	11/26/2025	N/A	IP
SG5 – Deployment Readiness	12/17/2025	N/A	F
SG6 – Confirm Deployment	12/30/2025	N/A	F
SG7 – Go-Live	1/6/2026	N/A	F

B. Scope Changes
List all scope changes (any changes from the original project objectives and deliverables that impact the project schedule or budget) identified during this reporting period, including those that may impact the project in later reporting periods.

Required for R&C Category

Scope Change Description	Cost Impact	Schedule Impact	Status *(if approved, include approval date)* / Variance Explanation / Comment
PCR118 – Segment V Financials Customizations	N/A	N/A	Approved on 06/26/2024 by the Executive Steering Committee (ESC) – Updates to business requirements and customizations for the Financials Wave – Implementation in progress during this reporting period.

3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues

Required for R&C Category

List all issues identified, open, occurring, or closed within this reporting period related to implementation of the Financials or Payroll Waves.

Issue Description	Status (Open/Closed)	Priority	Resolution Approach	Resolution Date	Owner
N/A					

B. Implementation Risks

Required for R&C Category

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 4 – Agencies' ability to adequately engage and participate may impact agency readiness	Open	6	The Project will utilize one or more of the following mitigations to manage the risk: 1. Conduct monthly meetings between Readiness Coordinators and agency Change Champion Network members to discuss internal readiness and preparation to transition to Florida PALM. 2. Conduct meetings between Project leadership and Agency Sponsors to discuss the agency's progress and any concerns, needs, or roadblocks that the agency is facing in their transition activities. 3. Lead meetings and workshops designed to share timely and relevant information with agencies throughout the Project's lifecycle. 4. Provide tools and information (e.g., graphics and content) to support messaging and communication within the agency regarding key implementation activities and change impacts.	Increasing	Angie Robertson

B. Implementation Risks
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner

Risk 5 – The timing and efficiency of information sharing between enterprise partners and agencies and the Project could impact the success of the Project	Open	6	The Project will leverage existing meetings and schedule additional as needed to discuss:
			1. The Project's timeline and status identifying timing for key work to be completed.
			2. Projected changes to:
			  a. Enterprise systems and their potential impact on the Project.
			  b. The Project and its potential impact on enterprise systems.
			3. Progress of integration.
			4. The Project will look for potential connections between the applications and Florida PALM identified during design and development and their impacts to enterprise partners.
				Increasing	Jimmy Cox

Risk 6 – The execution of contracts and procurement activities outside of the Project may impact Florida PALM implementation and agency readiness	Open	6	The Project will utilize one or more of the following strategies to manage the risk: 1. Provide the Project's timeline and key Project dates essential for agency and enterprise partner readiness (e.g., milestones). 2. Engage regularly with agency and enterprise partners to share information and to report progress towards key milestone dates. 3. Request updates and status reporting on key readiness activities. 4. Provide support or information to support agency, enterprise partner, or oversight body planning or decision making or needs.	Stable	Angie Robertson
Risk 7 – Impacts to the implementation schedule resulting from the scope	Open	6	Potential Impact 1: It has extended the projected duration of Segment IV design, increasing the overlap with Build Segments I	Stable	Jimmy Cox

B. Implementation Risks
List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
and length of Design Segment IV			and II along with other key tasks, also increasing the number of tasks the Project team members must complete simultaneously. 1. Where possible and where there is no impact to any of the Project Stage Gates or the planned distribution of information to state agencies, look to move or extend non-build and non-design tasks to reduce resource overlap. 2. Shift additional Application Development (AD) documentation review responsibilities to the Department's Enterprise Resource Planning Support Services Team. Potential Impact 2: It has increased the number of Functional Designs (FD) which must be developed during Design Segment IV. 1. Identify and prioritize critical FDs to be completed first as part of Design Segment IV, based on criteria such as other design dependencies, work effort, time to complete and input from parties external to the Project. 2. Coordinate the planned reviews of FDs and ADs to reduce and minimize overlap by all team members. 3. Continue existing Design and Build Blocker processes, and if needed, expand (e.g., add additional cadence and/or expand length of current) Design Disposition meetings to ensure design progress, potential issues and blockers are resolved quickly. 4. Actively manage resources to ensure each team member is effectively prioritizing their work and maximizing their ability to complete multiple concurrent tasks. 5. Maximize the additional four-weeks added to Design Segment IV to provide additional time for the review cycles for each FD.		

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B. Implementation Risks

List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			6. Move lower priority designs to Optional Services. 7. Increase the speed of creating FDs in Segment IV.		
Risk 8 – Scope and timing of Build Segments III and IV may impact the Project's ability to meet Stage Gates 2 and 3 and several Critical Path Items	Open	6	1. Onboard additional application development staff to supplement the existing staff. 2. Hold daily build update meetings (i.e., 15-minute stand-ups) to discuss the current progress of build activities, including any delays. 3. Increase the involvement of ERP Support Services team members to speed up reviews of application development documentation. 4. Reduce the number of reviewers for each application development document.	Stable	Jimmy Cox
Risk 9 – Overlap of System Testing with the Start of UAT	Open	6	1. Hold daily update meetings (i.e., 15–30-minute stand-ups) to discuss the current progress of Project activities, including any delays. 2. Increase the number of SSI Vendor system testers (e.g., supplement with current production support staff) in order to complete system testing activities quicker. 3. Combine the State and SSI Vendor system testing resources to speed up the system testing timeline, instead of each group testing independently. 4. Monitor progress to determine if other mitigation approaches are needed.	Increasing	Jimmy Cox

4 – SPEND PLAN

The Florida PALM Project was appropriated $63,769,143 for FY 2023-24. As of the end of this reporting period, $61,366,470 has been released, $57,485,080 has been projected fiscal year to date, $53,114,392 has been incurred, and $52,893.474 has been paid. See the Florida PALM Project Spend Plan for additional details.

5 – REMEDIATION AND TRANSITION TASKS REQUIRED TO REPLACE FLAIR

Remediation and Transition Tasks *Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).*		Required for R&C Category
Task Name	**Due Date**	**Actual Finish Date** *(Completed)*	**Status** *(C=Completed IP= In Progress F=Future)*
Stage Gate 1 – Ready to Start Build (includes the following critical path items): • Project Schedule (D635) – *Accepted* • Solution Design – Segment I (D636) – *Accepted* • Solution Design – Segment II (D637) – *Accepted* • Update Process Models – Financials – Segment I (I-WP101) – *Complete* • Update Process Models – Financials – Segment II (I-WP101) – *Complete* *Items do not need to be complete for the decision to start build.*	12/29/23	11/8/23	C
Stage Gate 2 – Ready to Begin System Testing (includes the following critical path items): • Solution Design – Segment III (D641) – *Accepted* • Process Models – Payroll (D639) – *Accepted* • Master Data Configuration Workbooks (D640) – *Accepted* • Updated Technical Architecture Design (D642) – *Accepted* • Update Process Models – Financials – Segment III (I-WP101) – *Complete* • Build – Segment I (D646) – *Accepted* • Solution Design – Segment IV (D644) * – *In Progress* • Update Process Models – Financials – Segment IV (I-WP101) * – *In Progress* • Environment Builds – System Test Environment *Items do not need to be complete for the decision to begin system testing.*	08/30/24	N/A	IP

Remediation and Transition Tasks
Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).

Task Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Stage Gate 3 – Ready to Begin UAT (includes the following critical path items): • Establish DW/BI Environments (D647) – ***Complete*** • Build – Segment II (D648) – ***In Progress*** • Security Roles Matrix (WP405) – ***In Progress*** • Environment Builds – Mock Conversion Test Environment • Environment Builds – Interface Test Environment • Solution Design – DW/BI (D650) – ***In Progress*** • Mock Conversion I (D651) • Build – Segment III (D649) • Build – DW/BI – Segment I (D653) • System Test – Segment I (D652) • Mock Conversion II (System Test) (D655) • Build – Segment IV (D654) • Build – DW/BI – Segment II (D659) • Environment Builds – UAT Test Environment • System Test – Segment II (D656) • Build – DW/BI – Segment III (D668) • Mock Conversion III (UAT) (D657) • System Test – DW/BI (D661)	03/28/25	N/A	IP
Stage Gate 4 – Agency Readiness (includes the following critical path items): • Training Build (I-WP110) • Role Mapping Worksheet (I-WP118) • Readiness Workplan (I-WP126) – ***Complete*** • Agency Readiness Certification (I-WP128) – ***In Progress***	11/26/25	N/A	IP

Remediation and Transition Tasks

Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).

Task Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Stage Gate 5 – Deployment Readiness • Environment Builds – Disaster Recovery Test Environment • Deployment and Contingency Plan (D658) • Environment Builds – Dry Run Test Environment • Environment Builds – Performance Test Environment • Mock Conversion IV (D662) • Interface Testing – Segment I (D663) • Regression Testing (WP416) • Mock Go-Live – Dry Run #1 (D667) • Disaster Recovery Testing (D676) • Payroll Parallel Testing (D670) • Interface Testing – Segment II (D671) • Mock Go-Live – Dry Run #2 (D673) • Penetration Testing (D674) • Performance Testing (D675) • Final Known Issues & Enhancements List (D678) • Mock Go-Live – Dry Run #3 (D677)	12/17/25	N/A	F
Stage Gate 6 – Confirm Deployment	12/30/25	N/A	F
Stage Gate 7 – Go-Live	01/06/26	N/A	F

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6 – TRAINING PLANS.

Training Plans for Department Staff			
Provide the status of the implementation of training plans for Department staff and identify the status of each item listed (Completed, In Progress, Future). Required for R&C Category			
Deliverable / Work Product / Activity Name	Due Date	Actual Finish Date *(Completed)*	Status *(C=Completed IP= In Progress F=Future)*
Update Training Strategy (I-WP122)	02/29/24	03/13/24	C
Training Curriculum (I-WP108)	11/15/24		IP
ILT Training Delivery Plan (I-WP113)	01/03/25		F
UAT Training Materials (I-WP111)	02/13/25		F
Training Build (I-WP110)	06/10/25		F
End User Manual (I-WP112)	08/05/25		F
Conduct Training	11/26/25		F

7 – REMEDIATION PROGRESS OF AGENCY BUSINESS SYSTEMS

Remediation Progress of Agency Business Systems
Provide an update on the remediation progress for each agency business system required for deployment of PALM functionality.

Required for R&C Category

Chapter 2023-240, implementing the 2023-2024 General Appropriations Act, directs agencies to submit bi-monthly status reports to the Florida PALM Executive Steering Committee. The agency-specific, bimonthly status reporting tool was released to agencies, through Readiness Workplan Task 538 for the period of May – June 2024, on July 1, 2024, with a due date of July 12, 2024, for completing the requested information and providing Agency Sponsor confirmation. All 35 agencies submitted their bimonthly status report by the time of this report. Agency reports and the summary dashboards are published on the Florida PALM website.

Agencies completed (noted with a check mark), continued, or began working on the following readiness tasks included in the Readiness Workplan during June:

Direct Project Impact

- Task 513 – Complete Configuration Workbooks for Segments I and II – Released: 1/29/2024 – Due: 5/13/2024
  - 32 agencies have submitted this task with 3 agency submissions remaining outstanding

Indirect Project Impact

- Task 529 – Update Florida PALM Conversion Inventory for Segment III – Released: 4/29/2024 – Due: 7/12/2024
- Task 530 – Update Florida PALM Interface Inventory for Segment III – Released: 4/15/2024 – Due: 7/12/2024
- Task 536-A – Create Agency Specific User Acceptance Testing Plan – Released: 6/17/2024 – Due: 8/16/2024

N/A Project Impact

- ✓ Task 519 – Remediate Agency Business Systems based on Segment I – Released: 1/29/2024 – Due: 6/28/2024
- ✓ Task 524 – Complete and Submit End User Readiness Survey Analysis – Released: 4/15/2024 – Due: 6/14/2024
- Task 526 – Complete Data Readiness Analysis and Data Cleansing Activities for Segment III – Released: 4/29/2024 – Due: 7/12/2024
- Task 527 – Identify Change Impacts and Update Agency Business Process Documentation for Segment III – Released: 4/15/2024 – Due: 7/12/2024
- Task 528 – Update Agency Business System Documentation for Segment III – Released: 4/15/2024 – Due: 7/12/2024
- Task 531 – Remediate Agency Business Systems based on Segment II – Released: 4/29/2024 – Due: 9/27/2024
- ✓ Task 533 – Manage Agency Specific Implementation Schedule, Risks and Issues – Released: 5/01/2024 – Due: 6/28/2024
- ✓ Task 534 – Update CCN and Project Contacts – Released: 6/03/2024 – Due: 6/14/2024
- Task 535 – Update Workforce Readiness Plan – Released: 6/17/2024 – Due: 8/02/2024
- Task 537 – Update Authorized Smartsheet Users – Released: 6/24/2024 – Due: 7/12/2024

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