

<b>Project Sponsor:</b>	Steven Fielder	<b>Project Director:</b>	Jimmy Cox
<b>Status Report Period:</b>	October 1, 2023 – October 31, 2023	<b>Current Project R&amp;C Category:</b>	4
<b>Project Start Date:</b>	Project funding began July 1, 2014	<b>Project End Date:</b>	July 19, 2027 (Funding appropriated through June 30, 2024)

## 1 – FLORIDA PALM STATUS OVERVIEW

A. Agency Engagement	Required for R&C Category <span style="border: 1px solid black; padding: 2px;">1 2 3 4</span>
<p>During the month of October, the Department completed the following:</p> <ul style="list-style-type: none"> <li>Hosted the <a href="#">Segment I Design Workshops</a> with agency business, technical, and subject matter experts</li> <li>Hosted two Liaisons Forums with focused engagement between peers for topics on <a href="#">Project Management</a> and <a href="#">Change Management and Training</a></li> <li>Hosted a <a href="#">Production Support Round Table</a> to highlight the upcoming system upgrade and to support end users questions</li> <li>Presented to the <a href="#">Human Resource Officers' Meeting</a> on planned Florida PALM payroll functionality</li> <li>Published a new <a href="#">reporting newsletter</a> that outlines the prior quarter's activities with agencies as it relates to data and reporting</li> <li>Published the first <a href="#">PALMcast</a> in a new series that focuses on Organizational Change Management topics</li> <li>Released six <a href="#">Readiness Workplan</a> tasks for agencies to create their own project charter, implementation schedule, risks and issues management plan, and workforce readiness plan as well as update their agency business system documentation and interface inventory following their review of Segment I design materials</li> <li>Continued focused conversations with agencies and enterprise partners in areas of specific importance and personalized support</li> </ul>	

B. Implementation Status	Required for R&C Category <span style="border: 1px solid black; padding: 2px;">1 2 3 4</span>		
	Yes	No	Explain:
<b>Is the project on schedule?</b> <small>If no, explain why and what corrective action(s) are planned to bring the project back on schedule</small>	✓		The Project Schedule includes implementation activities to be completed through post-implementation support and establishes major implementation activities and Stage Gate dates.
<b>Will the project complete on schedule?</b>	✓		The accepted Project Schedule shows the solution going live on January 6, 2026.
<b>Is the project currently within budget?</b> <small>If no, explain why and what corrective action(s) are planned to bring the project back within budget</small>	✓		The Project is currently within budget.

<b>B. Implementation Status</b>			Required for R&C Category <span style="border: 1px solid black; padding: 2px;">1 2 3 4</span>
	Yes	No	Explain:
<b>Will the project remain within budget?</b>	✓		Spend Plan details provided in section four.
<b>Were any Project Change Requests approved during this reporting period?</b>	✓		Project Change Request (PCR) 107 was approved during this period.
<b>Have any risks or issues impacted the project during the reporting period?</b>		✓	No new risks or issues have been identified.

<b>C. SPI</b> <i>Provide SPI for Current + Last 3 Reporting Periods</i>					Required for R&C Category <span style="border: 1px solid black; padding: 2px;">3 4</span>
	Past Reporting Period	Past Reporting Period	Last Reporting Period	<b>Current Reporting Period</b>	
Date	July 2023	August 2023	September 2023	October 2023	
<b>Project Schedule Performance Index (SPI)</b>	0.78	0.89	0.88	0.93	
<b>Explanation of SPI Variance / Trend</b>	This Schedule includes all activities needed to implement the Florida PALM Financial/Payroll Waves. The Project team was able to catch up on many design and configuration activities during the month of October, resulting in an increase in SPI.				

## 2 – IMPLEMENTATION PROGRESS

<b>A. Stage Gate Decision (Milestones and Critical Path Items)</b> 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 <span style="float: right;">2 3 4</span>
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	N/A	IP
SG2 – Ready to Begin System Testing	8/30/2024	N/A	IP
SG3 – Ready to Begin UAT	3/28/2025	N/A	F
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>B. Scope Changes</b> 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 <span style="float: right;">2 3 4</span>
Scope Change Description	Cost Impact	Schedule Impact	Status (if approved, include approval date) / Variance Explanation / Comment
PCR107 - Default Amount Only Flag and Requirement Updates	N/A	N/A	Approved on 10/25/2023 by the ESC – Financial and Payroll Waves related change – Implementation in progress during this reporting period

### 3 – IMPLEMENTATION ISSUES / RISKS

A. Implementation Issues <span style="float: right;">Required for R&amp;C Category </span>					
<i>List all issues identified, open, occurring, or closed within this reporting period related to implementation of the Financials or Payroll Waves.</i>					
Issue Description	Status (Open/Closed)	Priority	Resolution Approach	Resolution Date	Owner
N/A					

B. Implementation Risks <span style="float: right;">Required for R&amp;C Category </span>					
<i>List risks identified, open, occurring, or closed within the reporting period with risk score of 6 or greater.</i>					
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.	Stable	Carolyn Hicks

**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.	Increasing	Angie Robertson

**4 – SPEND PLAN**

The Florida PALM Project was appropriated \$63,769,143 for FY 2023-24. As of the end of this reporting period, \$36,695,961 has been released, \$19,022,812 has been projected fiscal year to date, \$18,740,269 has been incurred, and \$16,296,919 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 <span style="float: right;">2 3 4</span>
Task Name	Due Date	Actual Finish Date (Completed)	Status (C=Completed IP= In Progress F=Future)
<p><b>Stage Gate 1 – Ready to Start Build</b> (includes the following critical path items):</p> <ul style="list-style-type: none"> <li>Project Schedule (D635) – <b>Accepted</b></li> <li>Solution Design – Segment I (D636) – <b>Accepted</b></li> <li>Solution Design – Segment II (D637) – <b>In Progress*</b></li> <li>Update Process Models – Financials – Segment I (I-WP101) – <b>Complete</b></li> <li>Update Process Models – Financials – Segment II (I-WP101) – <b>In Progress*</b></li> </ul> <p><i>*Items do not need to be complete for the decision to begin build.</i></p>	12/29/23	N/A	IP
<p><b>Stage Gate 2 – Ready to Begin System Testing</b> (includes the following critical path items):</p> <ul style="list-style-type: none"> <li>Solution Design – Segment III (D641)</li> <li>Process Models – Payroll (D639) – <b>Accepted</b></li> <li>Master Data Configuration Workbooks (D640) – <b>In Progress</b></li> <li>Updated Technical Architecture Design (D642)*</li> <li>Update Process Models – Financials – Segment III (I-WP101)</li> <li>Build – Segment I (D646)</li> <li>Solution Design – Segment IV (D644)*</li> <li>Update Process Models – Financials – Segment IV (I-WP101)*</li> <li>Environment Builds – System Test Environment</li> </ul> <p><i>*Items do not need to be complete for the decision to begin system testing.</i></p>	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)
<p><b>Stage Gate 3 – Ready to Begin UAT</b> (includes the following critical path items):</p> <ul style="list-style-type: none"> <li>• Establish DW/BI Environments (D647)</li> <li>• Build – Segment II (D648)</li> <li>• Security Roles Matrix (WP405)</li> <li>• Environment Builds – Mock Conversion Test Environment</li> <li>• Environment Builds – Interface Test Environment</li> <li>• Solution Design – DW/BI (D650)</li> <li>• Mock Conversion I (D651)</li> <li>• Build – Segment III (D649)</li> <li>• Build – DW/BI – Segment I (D653)</li> <li>• System Test – Segment I (D652)</li> <li>• Mock Conversion II (System Test) (D655)</li> <li>• Build – Segment IV (D654)</li> <li>• Build – DW/BI – Segment II (D659)</li> <li>• Environment Builds – UAT Test Environment</li> <li>• System Test – Segment II (D656)</li> <li>• Build – DW/BI – Segment III (D668)</li> <li>• Mock Conversion III (UAT) (D657)</li> <li>• System Test – DW/BI (D661)</li> </ul> <p><i>*Items do not need to be complete for the decision to begin system testing.</i></p>	03/28/25	N/A	F

**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)
<p><b>Stage Gate 4 – Agency Readiness</b> (includes the following critical path items):</p> <ul style="list-style-type: none"> <li>• Training Build (I-WP110)</li> <li>• Role Mapping Worksheet (I-WP118)</li> <li>• Readiness Workplan (I-WP126) – <b>Complete</b></li> <li>• Agency Readiness Certification (I-WP128)</li> </ul> <p><i>*Items do not need to be complete for the decision to begin system testing.</i></p>	11/26/25	N/A	IP
<p><b>Stage Gate 5 – Deployment Readiness</b></p> <ul style="list-style-type: none"> <li>• Environment Builds – Disaster Recovery Test Environment</li> <li>• Deployment and Contingency Plan (D658)</li> <li>• Environment Builds – Dry Run Test Environment</li> <li>• Environment Builds – Performance Test Environment</li> <li>• Mock Conversion IV (D662)</li> <li>• Interface Testing – Segment I (D663)</li> <li>• Regression Testing (WP416)</li> <li>• Mock Go-Live – Dry Run #1 (D667)</li> <li>• Disaster Recovery Testing (D676)</li> <li>• Payroll Parallel Testing (D670)</li> <li>• Interface Testing – Segment II (D671)</li> <li>• Mock Go-Live – Dry Run #2 (D673)</li> <li>• Penetration Testing (D674)</li> <li>• Performance Testing (D675)</li> <li>• Final Known Issues &amp; Enhancements List (D678)</li> <li>• Mock Go-Live – Dry Run #3 (D677)</li> </ul> <p><i>*Items do not need to be complete for the decision to begin system testing.</i></p>	12/17/25	N/A	F



<b>Remediation and Transition Tasks</b>			
<i>Provide status tracking for remediation and transition tasks required to replace FLAIR and identify the status of each item listed (Completed, In Progress, Future).</i>			
Task Name	Due Date	Actual Finish Date <i>(Completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
<b>Stage Gate 6 – Confirm Deployment</b>	12/30/25	N/A	F
<b>Stage Gate 7 – Go-Live</b>	01/06/26	N/A	F

## 6 – TRAINING PLANS

<b>Training Plans for Department Staff</b>			
<i>Provide the status of the implementation of training plans for Department staff and identify the status of each item listed (Completed, In Progress, Future).</i>			Required for R&C Category <span style="border: 1px solid black; padding: 0 2px;">2 3 4</span>
Deliverable / Work Product / Activity Name	Due Date	Actual Finish Date <i>(Completed)</i>	Status <i>(C=Completed IP= In Progress F=Future)</i>
Update Training Strategy (I-WP122)	02/29/24		F
ILT Training Delivery Plan (I-WP113)	06/28/24		F
Training Curriculum (I-WP108)	11/15/24		IP
UAT Training Materials (I-WP111)	02/13/25		F
Training Designs (I-WP109)	05/29/25		F
Training Build (I-WP110)	06/10/25		F
End User Manual (I-WP112)	08/05/25		F
Train the Trainer (I-WP115)	08/08/25		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, bi-monthly status reporting tool was released to agencies, through Readiness Workplan Task 506, on October 30, 2023, with a due date of November 13, 2023, for completing the requested information and providing Agency Sponsor confirmation. As of November 15, 2023, 33 agencies submitted their bimonthly status report for the period of September to October 2023; one agency did not submit. The summary dashboard for each agency has been combined into one document and published on the [Florida PALM website](#).

Agencies continued or began working on the following readiness tasks included in the Readiness Workplan during October:

- Task 326 – Update Current-State Agency Business System Inventory and Documentation – Released 03/13/2023 – Due 10/27/2023
- Task 328 – Document Current Agency Business Processes – Released: 07/31/2023 – Due: 12/15/2023
- Task 500 – Create Agency Specific Charter – Released: 10/02/2023 – 12/15/2023
- Task 501 – Create Agency Specific Implementation Schedule – Released: 10/09/2023 – 12/15/2023
- Task 502 – Create Agency Specific Risks and Issues Management Plan – Released: 10/09/2023 – 12/15/2023
- Task 503 – Create Workforce Readiness Plan – Released: 10/16/2023 – 12/15/2023
- Task 504 – Update Agency Business System Documentation for Segment I – Released: 10/30/2023 – 1/12/2024
- Task 505 – Update Florida PALM Interface Inventory for Segment I – Released: 10/30/2023 – 1/12/2024