FloridaPALM
Planning, Accounting, and Ledger Management

Project Sponsor:	*Steven Fielder*	**Project Director:**	*Jimmy Cox*
Status Report Period*:*	*February 1, 2025 – February 28, 2025*	**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 1 2 3 4

During the month of February, the Department completed the following:

- Communicated Executive Steering Committee approval to move the go-live date for the Financials, Payroll, and Data Warehouse Implementation from January 2026 to July 2026.
- Published a "Know Your Change Impact" flyer for agencies to consider potential impacts from the duplicate warrants process change.
- Published four 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.
- Conducted Thursday Task Talks to provide a forum for agencies to learn or ask about RW Tasks.
- Continued to meet 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 1 2 3 4

	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*	✔		The Project Schedule is currently being updated to align with the updated timeline set by Amendment 12 to the SSI Contract, approved by the ESC on February 26, 2025, and fully executed on March 3, 2025.
Will the project complete on schedule?	✔		
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 4.

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?		✔	
Have any risks or issues impacted the project during the reporting period?	✔		Issue 33 – Inability to Achieve Stage Gate 3 on the Current Timeline (see Section 3 below)

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	November 2024	December 2024	January 2025	February 2025
Project Schedule Performance Index (SPI)	0.92	0.90	0.90	0.87
Explanation of SPI Variance / Trend	The SPI, which is based on the January 2026 Project Schedule, has decreased since the last reporting period. The current trend is due to delayed Build, Mock Conversion, and Interface Testing tasks, all of which are pushing successor tasks later in the schedule. Notably, Training and Technical Testing tasks, which are moving later with the updated timeline, are showing late in the current Schedule. The Project Schedule is currently being updated to align with the new timeline approved with the execution of Amendment 12 to the SSI Contract. This will have a positive impact on the SPI.			

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	11/08/2023	C
SG2 – Ready to Begin System Testing	08/30/2024	08/05/2024	C
SG3 – Ready to Begin UAT	07/30/2025	N/A	IP
SG4 – Continue Deployment	01/30/2026	N/A	F
SG5 – Agency Readiness	05/30/2026	N/A	IP
SG6 – Deployment Readiness	06/17/2026	N/A	IP
SG7 – Confirm Deployment	07/02/2026	N/A	F
SG8 – Go-Live	07/13/2026	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
SSI Contract, Amendment 12	$2,177,600	Go-Live date changed to July 2026	Approved on February 26, 2025, fully executed on March 3, 2025. Amendment 12 includes: • Update to the go-live date to July 2026 • Addition of a contingent go-live of January 2027 • Addition of a new Stage Gate 4: Continue Deployment • Addition of a CFO confirmation of the July 2026 go-live

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

			• Updates to conversion requirements based on change from Calendar Year to Fiscal Year cutover
			• Additional time for all parties to complete Build, Test, and Change Management activities
			• Adjustment to the start of Interface Testing (June 2025) and User Acceptance Testing (August 2025)
			• Cost Adjustments for the following Deliverables:
			  – D655 Completion of Mock Conversion II (System Test Environment)
			  – D657 Completion of Mock Conversion III
			  – D660 Payroll Parallel Testing Plan
			  – D661 Completion of System Test DW/BI
			  – D662 Completion of Mock Conversion IV
			  – D667 Completion of Dry Run #1
			  – D670 Completion of Payroll Parallel Testing
			  – D673 Completion of Dry Run #2
			  – D677 Completion of Dry Run #3
			  – D678 Final Known Issues & Enhancements Lists
			  – D696 Completion of System Test Segment III

3 – IMPLEMENTATION ISSUES / RISKS

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

Required for R&C Category

Issue Description	Status (Open / Closed)	Priority	Resolution Approach	Resolution Date	Owner
Issue 33 – Inability to Achieve Stage Gate 3 on the Current Timeline.	Open	High	The Project will: 1. Negotiate, approve, and execute an amendment to the SSI contract to adjust the Project timeline, including Stage Gate Decision dates for the next Major Implementation of Florida PALM. (03/03/25) – Completed on 03/03/2025 2. Update the Project Schedule based on negotiated changes to the contract and timeline, where needed, to support successful implementation of the next Major Implementation of Florida PALM. (03/24/25) – In Process 3. Communicate changes in activities and timing associated with implementing the next Major Implementation of Florida PALM to the appropriate stakeholders. (03/24/25) – In Process	3/24/2025	Jimmy Cox

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

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 2 – External stakeholders (e.g., Legislature, EOG) and agencies expectations may not be aligned with the Florida PALM cost, schedule, or scope.	Open	6	Project Directors will provide Project cost, schedule, and scope updates to external stakeholders regularly using the monthly Project status report, other required reports per Proviso, legislative meetings (e.g., committee meetings) and other ad hoc opportunities. The Project will:	Increasing	Jimmy Cox

B. Implementation Risks

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

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
			1. Share information about business process models, interface designs, and report through the Knowledge Center as they are approved. 2. Share comprehensive details about the Solution (FIN/Payroll/DW) as it becomes available and is ready for distribution. 3.Share information through activities, such as Advisory Council meetings and Sponsor Summits, and through written materials, such as Newsletter, Sponsor Scoops, and articles in the Knowledge Center. 4. Work with agencies as needed to educate agencies on available reports, queries, and interface files, and to support the agencies determinations on whether their agency critical business needs are met by these Solutions, or if additional agency specific Solutions are required. 5. Address agency questions during Readiness Touchpoints and as follow-ups to agency submitted questions, including publishing questions to the public view of the Question Log on the Florida PALM website. 6. Support agency evaluation of business system needs as they relate to data and reporting.		

B. Implementation Risks

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

Required for R&C Category

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	9	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 their 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 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 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. 5. Review bimonthly agency status reports for indicators and trends relating to engagement difficulties.	Increasing	Angie Robertson

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

Required for R&C Category

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	9	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	9	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. 5. Continue regular meetings and develop mitigation actions should specific contracts not be executed and applications ready at Florida PALM Launch.	Increasing	Angie Robertson

B. Implementation Risks

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

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 8 – Scope and timing of Build Segments may impact the Project's ability to meet Stage Gate 3 and several Critical Path Items.	Open	9	The Project will utilize one or more of the following strategies to manage the risk: 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. 5. Hold internal working meetings to identify additional dependencies and schedule tasks to assist with work planning and execution.	Increasing	Jimmy Cox

B. Implementation Risks

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

Required for R&C Category

Risk Description	Status (Open / Closed)	Risk Score	Mitigation/Response Strategy	Trend	Owner
Risk 9 – Overlap of System Testing with the Start of User Acceptance Testing (UAT) may result in a delay of UAT and higher defects and issues.	Open	9	The Project will utilize one or more of the following strategies to manage the risk: 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. 5. Onboard additional state resources to support DW/BI activities. 6. Hold internal working meetings to identify additional dependencies and schedule tasks to assist with work planning and execution.	Increasing	Jimmy Cox
Risk 10 - Failure to timely execute Amendment 12 will significantly impact the Project's ability to proceed with implementation activities.	Open	6	The Project will continue to work with ESC members to answer questions or discuss concerns as they continue their review. If the Amendment is not executed by March 3, 2025, the Project will log an Issue and identify appropriate Action Plans to resolve.	Increasing	Jimmy Cox

4 – SPEND PLAN

The Florida PALM Project was appropriated $60,944,787 for FY 2024-25. As of the end of this reporting period, $42,479,549 has been released, $30,781,670 has been projected fiscal year to date, $24,641,681 has been incurred, and $22,225,749 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	11/08/23	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) * – ***Accepted*** • Update Process Models – Financials – Segment IV (I-WP101) * – ***Complete*** • Environment Builds – System Test Environment – ***Complete*** **Items do not need to be complete for the decision to begin system testing*	08/30/24	08/05/24	C

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 3 – Ready to Begin UAT (includes the following critical path items):	07/30/25	N/A	IP

• Establish DW/BI Environments (D647) – *Accepted*
   • Build – Segment II (D648) – *Accepted*
   • Security Roles Matrix (WP405) – *Complete*
   • Environment Builds – Mock Conversion Test Environment – *Complete*
   • Environment Builds – Interface Test Environment – *Complete*
   • Solution Design – DW/BI (D650) – *Accepted*
   • Mock Conversion I (D651) – *In Progress*
   • Build – Segment III (D649) – *In Progress*
   • Build – DW/BI – Segment I (D653) – *Accepted*
   • System Test – Segment I (D652) – *Accepted*
   • Mock Conversion II (System Test) (D655) – *On Pause*
   • Build – Segment IV (D654) – *In Progress*
   • Build – DW/BI – Segment II (D659) – *In Progress*
   • Environment Builds – UAT Test Environment **– *In Progress***
   • System Test – Segment II (D656) – *In Progress*
   • System Test – Segment III (D696) *
   • Build – DW/BI – Segment III (D668) – *In Progress*
   • Mock Conversion III (UAT) (D657)
   • System Test – DW/BI (D661) *
 *Items do not need to be complete for the decision to begin user acceptance testing.			

Stage Gate 4 – Continue Deployment	01/30/26	N/A	F
Stage Gate 5 – Agency Readiness (includes the following critical path items):	05/30/26	N/A	IP

• Training Build (I-WP110) – *In Progress*
   • Role Mapping Worksheet (I-WP118) – *In Progress*
   • Readiness Workplan (I-WP126) – *Complete*
   • Agency Readiness Certification (I-WP128) – *Complete*			

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 6 – Deployment Readiness • Environment Builds – Disaster Recovery Test Environment • Deployment and Contingency Plan (D658) – ***In Progress*** • Environment Builds – Dry Run Test Environment • Environment Builds – Performance Test Environment • Mock Conversion IV (D662) • Interface Testing – Segment I (D663) – ***In Progress*** • System Test – Segment III (D696) • 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)	06/17/26	N/A	IP
Stage Gate 7 – Confirm Deployment	07/02/26	N/A	F
Stage Gate 8 – Go-Live	07/13/26	N/A	F

6 – TRAINING PLANS.

Training Plans for Department Staff [1]

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	11/19/24	C
ILT Training Delivery Plan (I-WP113)	01/03/25		IP
UAT Training Materials (I-WP111)	06/13/25		IP
Training Build (I-WP110)	08/11/25		IP
End User Manual (I-WP112)	08/29/25		IP
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 Florida PALM functionality.

Required for R&C Category

Chapter 2024-228 implementing the 2024-2025 General Appropriations Act, directs agencies to submit bimonthly status reports to the Florida PALM Executive Steering Committee. The agency-specific, bimonthly status reporting tool was released to agencies, through Readiness Workplan Task 589 for the period of January - February 2025, on February 28, 2025, with a due date of March 10, 2025, for completing the requested information and providing Agency Sponsor confirmation. Primary Agency Sponsors for 34 agencies submitted their bimonthly status for the period of January to February 2025, as of March 14, 2025. One agency remains unsubmitted. 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 February:

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[1] Deliverables / Work Products / Activity Names and Due Dates are not reflective of replanning due to Amendment 12 but will be updated for March Status Report.

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

Required for R&C Category

Direct Project Impact

- ✓ Task 546 – Update Florida PALM Interface Inventory for Segment IV – Released: 07/22/2024 – Due: 10/18/2024
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 541-C – Complete Configuration Workbooks for Segment IV - Payroll (PR) and SpeedKey – Released: 08/26/2024 – Due: 10/04/2024
  - o 29 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 555-C – Complete Data Cleansing Based on Mock Conversion 1 (AMC001 and POC001) – Released: 11/08/2024 – Due: 12/06/2024
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 557 – Confirm Interface Inventory for Cycle 2 Interface Testing – Released: 11/18/2024 – Due: 12/13/2024
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 567-J – Share, Review, and Update Configuration Workbooks (AR – Distribution Code) – Released: 12/18/2024 – Due: 01/17/2025
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 567-P – Share, Review, and Update Configuration Workbooks (SpeedKey) – Released: 12/18/2024 – Due: 02/14/2025
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 658-A – Submit Data Field Mapping (Organization) – Released: 12/18/2024 – Due 02/14/2025
  - o 32 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 658-B – Submit Data Field Mapping (OCA) – Released: 12/18/2024 – Due 02/14/2025
  - o 32 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 658-C – Submit Data Field Mapping (Grant ID) – Released: 01/06/2025 – Due 02/14/2025
  - o 33 out of 35 agencies have submitted and have been verified as complete
- ✓ Task 567-Q – Share, Review, and Update Configuration Workbooks (GL – Default Interest Apportionment) – Released: 01/27/2025 – Due: 02/21/2025
  - o 33 out of 35 agencies have submitted and have been verified as complete
- • Task 658-D – Submit Data Field Mapping (Location Code) – Released: 02/03/2025 – Due 03/14/2025

Indirect Project Impact

- • Task 563-C – Create Agency Specific User Acceptance Testing Plan – Released: 12/09/2024 – Due 03/28/2025
- • Task 576 – Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing – Released: 01/06/2025 – Due: 03/28/2025

N/A Project Impact

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

Required for R&C Category

- Task 561 – Remediate Agency Business Systems based on Segment IV – Released: 10/21/2024 – Due: 03/14/2025
- Task 560 – Submit Change Analysis Tool – Released: 12/09/2024 – Due 03/28/2025
- Task 568 – Create Training Plan for Agency Managed End User Training – Released: 12/09/2024 – Due 03/28/2025
- ✓ Task 570 – Manage Agency Specific Implementation Schedule, Risks and Issues – Released: 12/30/2024 – Due 02/28/2025
- ✓ Task 582 – Share Florida PALM Updates – Released: 01/27/2025 – Due 02/07/2025
- ✓ Task 584 – Update Authorized Smartsheet Users – Released: 01/27/2025 – Due 02/07/2025
- Task 589 – Submit Bimonthly Agency Readiness Status Report – Released: 02/28/2025 – Due 03/10/2025
- Task 590 – Manage Agency Specific Implementation Schedule, Risks and Issues – Released: 02/28/2025 – Due 04/30/2025