

Project Overview & Accomplishments

- ✓ On June 22, the Project Charter was approved by the Steering Committee.
- ✓ Effective July 1, Melissa Turner has been named Project Director for the Florida PALM Project. Melissa previously served as Interim Project Director.
- ✓ On July 7, the Project Management Plan (PMP) was approved by the Steering Committee.
- ✓ On August 4, a Vendor Forum will be held to provide an update on the Project's procurement activities, specifically focused on the release of the ITN for Software and System Integrator services.

Business Process Standardization (BPS)

Level Standardized Business Process Models:

BPS conducted Workshops with all agencies June 10 – 18 where the Team walked through two sets of key financial activities: Payment and Receipts. On June 22, a Process Evaluation Questionnaire was sent to all agency Administrative Directors asking for feedback on the proposed future financial management processes by July 10. The Project received responses on behalf of 26 organizations totaling over 300 lines of comments and questions. The Team is working through addressing questions and adjusting Level 2 documents accordingly. Over the next couple of weeks, the Team will finalize feedback to questions and comments from agencies to the Process Evaluation Questionnaire and determine the best method for providing the updated flows and narratives, as well as answers to agency questions.

Requirements:

On July 10, the DFS division reviewers began their review of over 3,800 draft functional and technical requirements the Team put together from Aspire requirements, KnowledgePack requirements brought by the BPS contractor, and from requirements collected from Level 1 and Level 2 Workgroups. The divisions completed their review on July 28 and the BPS Team will work to incorporate their suggested edits.

Organizational Change Management (OCM)

OCM facilitated the Workshops conducted with all agencies June 10 – 18. During June and July, collaboration continued with the other government entities that utilize ERPs to gain insights into their lessons learned. Several meetings were held over the past few months between Florida PALM Managers and representatives from FSU, FAMU, and the City of Tallahassee. During July, collaboration was initiated with FFMS entities to begin to discuss the impacts of the proposed future financial management processes, considerations for procurement, and approach for continued collaboration throughout implementation.

Project Management Office (PMO)

Software and System Integrator (SSI) Procurement:

The SSI Procurement contractor, the PMO, members from all Project Tracks, and the Project Sponsors are working on various deliverables related to the SSI Procurement.

Other Procurements:

Two outside counsel law firms have been selected to provide support for the SSI Procurement. The firms will assist with procurement support and provide expertise in contracting for the ERP solution and services. In June, a solicitation for Pre-SSI Independent Verification & Validation (IV&V) services was released. An agreement for IV&V services is targeted to for execution in August. In July, a solicitation for additional PMO support staff was released. An agreement for additional PMO support staff is targeted for execution in August.

Systems and Data Strategy (SDS)

SDS continued to support the development and initial review of technical requirements. In addition, SDS worked with the DFS Division of Information Systems (DIS) to confirm the integration points of the existing systems (FLAIR and CMS). The Team is working on developing the Project's Data Management Plan, which is currently targeted for completion in October.