

Business Process Standardization Level 2 Workgroup Summary Report (I-OCM8)

Table of Contents

Executive Summary	3
Background and Objectives	4
Event Logistics.....	4
Appendix A: Event Logistics Data	5
Project Process Areas	5
Agency Participation by Workgroup.....	5
Agency SMEs Registered to Participate by Workgroup	6
Appendix B: BPS Level 2 Workgroup Meeting Summaries.....	8
Appendix C: BPS Level 2 Workgroup Survey Summary Report.....	9

Executive Summary

The Level 2 Workgroups brought together 25 State agencies and 143 agency subject matter experts (SMEs) for 30 sessions during April and May of 2015. The Workgroups leveraged and expanded upon previous agency collaboration activities to facilitate development of Level 2 process flows and narratives for the Project's ten Process Areas. Additionally, the Workgroups provided information intended to increase agency SME Project knowledge. Given logistical demands of an event this size, Workgroups were held at multiple venues across Tallahassee, Florida with options for participants to attend in person or virtually.

The Project Team made several adjustments to the approach used for collaboration during the Level 1 Workgroups. Agency collaboration and participation was expanded from 17 total State agencies participating in Level 1 Workgroups, to 29 State agencies during the Level 2 Workgroups (representing a 42 percent increase). The number of participating SMEs also increased from 99 during the Level 1 Workgroups, to 143 for Level 2 Workgroups (representing a 31 percent increase). With the support of agency SMEs, the Project achieved a major milestone during the Level 2 Workgroups by developing 46 process flows representing future financial business processes for ten Process Areas identified by the Project. These flows will provide a major foundational component for identification and development of the future vision of business processes which will be used in the Software and System Integrator (SSI) Invitation to Negotiate (ITN). Additionally, the Project Team was also able to increase SMEs' overall Project knowledge during the Workgroup.

The following report provides more detailed background information for the Level 2 Workgroups, additional discussion of the Workgroup objectives, and concludes with event logistics information including high-level attendance statistics. Additional data tables, Workgroup supporting materials, and the Level 2 Workgroup Survey Summary are included as appendices to this report.

Background and Objectives

The Florida PALM Project's Business Process Standardization (BPS) efforts have been focused on two major initiatives (Level 1 and Level 2) surrounding the development of standardized business process flows and narratives (business process models). In late 2014, the Project team collaborated with 99 agency SMEs from 17 State agencies to complete the initial Level 1 analysis. The main goal of this effort was to produce a set of high-level business process flows and narratives that identified key business events for each of the Project's ten Process Areas.

The development of the Level 2 process models began in the spring of 2015 with a Level 2 SME Workgroup Kickoff meeting. SMEs from 29 agencies registered to participate in the Level 2 Workgroups focusing on development of the Level 2 Process flows and narratives. These new process flows included integration points between the Florida Accounting Information Resource (FLAIR) and/or Cash Management System (CMS) and agency business systems. The main goals of the Level 2 Workgroups were to:

1. Continue collaboration with State agencies to develop and refine standardized business process flows and narratives;
2. Develop Level 2 process flows and narratives, using the Level 1 process flows as a foundation, targeted to be used in the SSI ITN; and
3. Increase of overall State agency staff knowledge about the Project and their understanding of the Project's goals and objectives.

Event Logistics

The Business Process Standardization Level 2 Workgroup Kickoff meeting was held on April 7, 2015. Shortly after the conclusion of the Kickoff meeting, the Project Team began a series of Level 2 Workgroups. These Workgroups were organized by Project Process Area. Two to four Workgroups were scheduled for each Process Area. The number of Workgroups depended on the Process Area's complexity, the number of unique processes it contained, and the number agencies with significant business interests in that area. Thirty Workgroups in total were scheduled; 29 were held from April 14 – May 28.¹ Each Workgroup was scheduled for three hours.

One hundred forty-three SMEs participated in the Level 2 Kickoff and Workgroups across ten Project Process Areas. Sixty-five percent of the agencies currently using FLAIR and/or CMS participated in at least one Process Area Workgroup (25/34). As with the number of Workgroups per Process Area, the number of SMEs and agencies participating in each Workgroup varied. In general, the greater the complexity, number of unique processes, and/or agencies with significant business interests in the process, the greater the number of SMEs and agencies participating in that Process's Workgroups. Virtual attendance options were available for SMEs who were unable to attend in person.

Please see Appendix A for additional event logistics data, Appendix B for meeting summaries for Workgroups, and Appendix C for the Level 2 Workgroup Survey Summary Report.

¹ The A2D Workgroup team completed their tasks ahead of schedule. It was therefore determined that additional Workgroups were not necessary.

Appendix A: Event Logistics Data

Project Process Areas

Table 1: Project Process Areas and Acronyms

Process Name	Acronym
Asset Acquisition to Disposal	A2D
Accounts Receivable / Billing to Receipts	ARB
Budget Preparation to Reversion	BUD
Cash Inflow to Outflow	CSH
Grant Application to Closeout	GAC
Procurement to Payment	P2P
Payroll Hire to Separation	PAY
Project Development to Closeout	PJT
Record to Report	R2R
Treasury Management	TRM

Agency Participation by Workgroup

Table 2: Agency Participation by Process Area Workgroup.

Agency ²	Agency Code	A 2 D	A R B	B U D	C S H	G A C	P 2 P	P A Y	P J T	R 2 R	T R M	Total
Agency for Health Care Administration	AHCA											2
Agency for Persons with Disabilities	APD											1
Agency for State Technology	AST											0
Department of Business and Professional Regulation	DBPR											2
Department of Children and Families	DCF											4
Department of Citrus	FDOC											0
Department of Economic Opportunity	DEO											4
Department of Education	DOE											4
Department of Elder Affairs	DOEA											1
Department of Financial Services	DFS											10
Department of Health	DOH											2
Department of Highway Safety and Motor Vehicles	DHSMV											3
Department of Juvenile Justice	DJJ											3
Department of Legal Affairs	DLA											1
Department of Management Services	DMS											4
Department of Military Affairs	DMA											0
Department of Revenue	DOR											5
Department of State	DOS											2
Department of the Lottery	DOL											1

² A green solid field indicates agency participation in the Workgroup. SMEs from 29 agencies were registered to participate.

Agency ²	Agency Code	A 2 D	A R B	B U D	C S H	G A C	P 2 P	P A Y	P J T	R 2 R	T R M	Total
Florida Department of Transportation	FDOT											5
Department of Veterans' Affairs	FDVA											1
Division of Administrative Hearings	DOAH											0
Executive Office of the Governor	EOG											2
Florida Commission on Offender Review (Formerly: Florida Parole Commission)	FCOR											0
Florida Department of Agriculture and Consumer Services	DACS											4
Florida Department of Corrections	DC											3
Florida Department of Environmental Protection	DEP											3
Florida Department of Law Enforcement	FDLE											2
Florida Fish and Wildlife Conservation Commission	FWC											2
Florida School for the Deaf and the Blind	FSDB											0
Justice Administrative Commission	JAC											2
Florida Legislature	LEG											1
Public Service Commission	PSC											0
State Courts	SC											0
Total number of agencies participating in each Process Area Workgroup		8	8	7	7	8	9	7	8	9	3	N/A

Agency SMEs Registered to Participate by Workgroup

Table 3: Agency SMEs Participating by Process Area Workgroup.

Agency ³	Agency Code	A 2 D	A R B	B U D	C S H	G A C	P 2 P	P A Y	P J T	R 2 R	T R M
Agency for Health Care Administration	AHCA				1					1	
Agency for Persons with Disabilities	APD									2	
Agency for State Technology	AST										
Department of Business and Professional Regulation	DBPR		2		2						
Department of Children and Families	DCF			2		2			2	2	
Department of Citrus	FDOC										
Department of Economic Opportunity	DEO					2		2		2	3
Department of Education	DOE	2				5			3	3	
Department of Elder Affairs	DOEA				2						
Department of Financial Services	DFS	1	1	3	9	1	2	1	1	3	25
Department of Health	DOH		3				4				
Department of Highway Safety and Motor Vehicles	DHSMV	3					2	1			
Department of Juvenile Justice	DJJ		2			2			1		
Department of Legal Affairs	DLA		2								
Department of Management Services	DMS	2					3	1	2		

³ A light green field indicates agency SMEs participated in the Workgroup. The numeral in the field indicates the number of agency SMEs that participated.

Agency ³	Agency Code	A 2 D	A R B	B U D	C S H	G A C	P 2 P	P A Y	P J T	R 2 R	T R M
Department of Military Affairs	DMA										
Department of Revenue	DOR		2	2	2			2			2
Department of State	DOS	2					2				
Department of the Lottery	DOL									1	
Florida Department of Transportation	FDOT	3		3	2			2	2		
Department of Veterans' Affairs	FDVA								2		
Division of Administrative Hearings	DOAH										
Executive Office of the Governor	EOG			4		2					
Florida Commission on Offender Review (Formerly: Florida Parole Commission)	FCOR										
Florida Department of Agriculture and Consumer Services	DACS		2			3	5			2	
Florida Department of Corrections	DC	1		2					1		
Florida Department of Environmental Protection	DEP	1			1		1				
Florida Department of Law Enforcement	FDLE		2	2							
Florida Fish and Wildlife Conservation Commission	FWC					2	2				
Florida School for the Deaf and the Blind	FSDB										
Justice Administrative Commission	JAC						4	2			
Florida Legislature	LEG									1	
Public Service Commission	PSC										
State Courts	SC										
Number of agency SMEs that attended a Process Area Workgroup ⁴		15	16	14	19	17	25	11	14	17	15

⁴ Table 3 provides the count of agency SMEs attending each Workgroup (163). This value is not the same as the total number of individual SMEs that participated in the BPS Level 2 Workgroup (143).

Appendix B: BPS Level 2 Workgroup Meeting Summaries

Process Area	Meeting 1	Meeting 2	Meeting 3	Meeting 4
Accounts Receivable/Billing to Receipt (ARB)	April 30, 2015	May 6, 2015	May 13, 2015	n/a
Asset Requisition to Disposal (A2D)	May 13, 2015	May 19, 2015	Canceled	n/a
Budget Preparation to Reversion (BUD)	April 27, 2015	May 4, 2015	May 11, 2015	n/a
Cash Inflow to Outflow (CSH)	April 22, 2015	April 29, 2015	May 28, 2015	n/a
Grant Application to Closeout (GAC)	April 14, 2015	April 21, 2015	May 14, 2015	n/a
Payroll Hire to Separation (PAY)	May 19, 2015	May 27, 2015	n/a	n/a
Procurement to Payment (P2P)	April 14, 2015	April 27, 2015	May 7, 2015	May 20, 2015
Project Development to Closeout (PJT)	April 15, 2015	April 22, 2015	May 12, 2015	n/a
Record to Report (R2R)	April 21, 2015	April 28, 2015	May 5, 2015	n/a
Treasury Management (TRM)	May 5, 2015	May 12, 2015	May 20, 2015	n/a

Appendix C: BPS Level 2 Workgroup Survey Summary Report

[Click here](#) to access the BPS Level 2 Workgroup Survey Summary Report.