

# Business Process Standardization Level 2 Workshop Summary Report (I-OCM10)

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## **Executive Summary**

The Florida PALM Project Business Process Standardization (BPS) Track began its Level 2 analysis in early 2015. BPS Level 2 Workshops were scheduled to share the Level 2 draft process flows and narratives developed during Level 2 Workgroups with all agencies. The goal of the BPS Level 2 Workshops was to promote collaboration with State agencies through sharing information and gathering feedback. Held in June 2015, the BPS Level 2 Workshops consisted of two courses: *Payment Processing for Goods and Services (PALM 100)* and *Receipt Processing for Funds Received (PALM 200)*. The Workshops included a presentation of the Level 2 analysis, distribution of Level 2 draft documents, and distribution of the BPS Process Evaluation Questionnaires (PEQs). PALM 100 had a 74 percent attendance rate, while PALM 200 had an 81 percent attendance rate. Although all State agencies were invited to attend, 28 of 34 (82 percent) of State agencies overall were represented at the Workshops.

The following report provides more detailed information about the background leading to the BPS Level 2 Workshops, additional discussion of the Workshop objectives, and concludes with event logistics information including high-level attendance statistics. Further data tables, Workshop supporting materials, and the BPS Level 2 Workshop Survey Summary Report are included as appendices to this report.

## Background and Objectives

In spring 2015, the BPS Track conducted a series of Level 2 Workgroups by convening subject matter experts from multiple State agencies who contributed to the process designs. (For additional information about the Level 2 Workgroups, see the BPS Level 2 Workgroup Summary Report.) Following the completion of Level 2 Workgroups, all State agencies were invited to attend Level 2 Workshops. The Workshops included a presentation of the Level 2 analysis, distribution of Level 2 draft documents, and distribution of the BPS Process Evaluation Questionnaires (PEQs). (An analysis of the PEQ responses will be provided in a separate report.) The Workshops were held with the objective of sharing the previous analysis and gathering additional improvement feedback via the PEQs. The Workshops also provided visibility into all Process Areas and the proposed financial processes to be standardized statewide.

## Event Logistics

BPS Level 2 Workshops consisted of two courses: *Payment Processing for Goods and Services (PALM 100)* and *Receipt Processing for Funds Received (PALM 200)*. Eight total Workshops were offered, four per course. The Workshops were conducted during a two week period from June 10 – June 17, 2015. Each Workshop was scheduled for three hours in alternating morning and afternoon times. Multiple Workshop offerings expanded the number of opportunities for Florida PALM Team members and State agencies to attend both courses and provided flexibility for attendees to choose times that best fit their schedule. All State agencies were invited to attend the Workshops. In addition, all attendees were asked to complete an online Workshop survey via SurveyMonkey to evaluate the event.

Overall, 74 percent of registrants attended the PALM 100 Workshops (127/172), while 81 percent of registrants attended the PALM 200 Workshops (113/139). In addition, 82 percent of agencies using the Florida Accounting Information Resource (FLAIR) and/or Cash Management System (CMS) were present at PALM 100 Workshops (28/34), while 79 percent were present at PALM 200 Workshops (27/34), with an overall rate of 82 percent of State agencies represented (28/34). Agencies with the largest representation of attendees at PALM 100 Workshops were: Florida Department of Transportation (24), Department of Financial Services (20), and Department of Economic Opportunity (9). Similarly, the agencies with the largest representation of attendees at PALM 200 Workshops were: Department of Financial Services (16), Florida Department of Transportation (11), and Department of Revenue (10).

Please see Appendix A for additional event logistics attendance data, Appendix B for the BPS Level 2 Workshop Supporting Materials, and Appendix C for the BPS Level 2 Workshop Survey Summary Report.

## Appendix A: Event Logistics Data

Table 1: Workshop Dates and Times

<b>PALM 100 Payment Processing for Goods and Services</b>	<b>PALM 200 Receipt Processing for Funds Received</b>
Wednesday, June 10, 9 a.m. – 12 p.m.	Wednesday, June 10, 1:30 – 4:30 p.m.
Thursday, June 11, 1:30 – 4:30 p.m.	Thursday, June 11, 9 a.m. – 12 p.m.
Tuesday, June 16, 1:30 – 4:30 p.m.	Tuesday, June 16, 9 a.m. – 12 p.m.
Wednesday, June 17, 9 a.m. – 12 p.m.	Wednesday, June 17, 1:30 – 4:30 p.m.

Table 2 : PALM 100 Attendance

<b>PALM 100 Payment Processing for Goods and Services</b>	<b>Registered</b>	<b>Attended</b>	<b>Percent Attended</b>
Wednesday, June 10, 9 a.m. – 12 p.m.	46	37	80%
Thursday, June 11, 1:30 – 4:30 p.m.	54	40	74%
Tuesday, June 16, 1:30 – 4:30 p.m.	40	27	68%
Wednesday, June 17, 9 a.m. – 12 p.m.	32	23	72%
Total	172	127	74%

Table 3: PALM 200 Attendance

<b>PALM 200 Receipt Processing for Funds Received</b>	<b>Registered</b>	<b>Attended</b>	<b>Percent Attended</b>
Wednesday, June 10, 1:30 – 4:30 p.m.	27	27	100%
Thursday, June 11, 9 a.m. – 12 p.m.	40	35	88%
Tuesday, June 16, 9 a.m. – 12 p.m.	33	24	73%
Wednesday, June 17, 1:30 – 4:30 p.m.	39	27	69%
Total	139	113	81%

Table 4: Attendance by Agencies using FLAIR and/or CMS

Agency Using FLAIR and/or CMS	PALM 100	PALM 200
Agency for Health Care Administration (AHCA)	1	1
Agency for Persons with Disabilities (APD)	0	0
Agency for State Technology (AST)	2	2
Department of Business and Professional Regulation (DBPR)	4	3
Department of Children and Families (DCF)	1	3
Department of Economic Opportunity (DEO)	9	8
Department of Education (DOE)	1	0
Department of Elder Affairs (DOEA)	1	1
Department of Financial Services (DFS)	20	16
Department of Highway Safety and Motor Vehicles (DHSMV)	7	7
Department of Juvenile Justice (DJJ)	5	5
Department of Legal Affairs (DLA)	3	3
Department of Management Services (DMS)	4	3
Department of Military Affairs (DMA)	2	2
Department of Revenue (DOR)	1	10
Department of State (DOS)	0	0
Department of the Lottery (DOL)	6	5
Division of Administrative Hearings (DOAH)	0	0
Executive Office of the Governor (EOG)	3	4
Florida Commission on Offender Review (FCOR)	0	0
Florida Department of Agriculture and Consumer Services (DACCS)	4	2
Florida Department of Citrus (FDOC)	0	0
Florida Department of Corrections (DC)	2	2
Florida Department of Environmental Protection (DEP)	8	6
Florida Department of Health (DOH)	2	1
Florida Department of Law Enforcement (FDLE)	5	4
Florida Department of Transportation (FDOT)	24	11
Florida Department of Veterans' Affairs (FDVA)	1	3
Florida Fish and Wildlife Conservation Commission (FWC)	2	5
Florida Legislature (LEG)	2	1
Florida School for the Deaf and the Blind (FSDB)	0	0
Justice Administrative Commission (JAC)	1	1
Public Service Commission (PSC)	1	1
State Courts (SC)	5	3
Total	127	113

## **Appendix B: BPS Level 2 Workshop Supporting Materials**

See the following supporting materials posted at:

<http://www.myfloridacfo.com/floridapalm/Level2Workshops.htm>.

- PALM 100 Payment Processing for Goods and Services presentation
- PALM 200 Receipt Processing for Funds Received presentation
- Pre-Workshop materials
- Draft Level 2 process narratives and workflows for agency review

## **Appendix C: BPS Level 2 Workshop Survey Summary Report**

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