

# Business Process Standardization Level 2 and Functional Requirements Review Workshop Summary Report (I-OCM14)

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## **Executive Summary**

The Florida PALM Project's Business Process Standardization (BPS) Level 2 and Functional Requirements Review Workshops (PALM 300) were held in September 2015 with the objective of reviewing significant updates to the Level 2 Process Flows and Narratives based on agency feedback received since the Level 2 Workshops (PALM 100 and PALM 200) in June 2015, including Process Evaluation Questionnaires (PEQs) responses. The BPS Level 2 and Functional Requirements Review Workshops also provided an overview of the planned business requirements agency review process. In addition, the Workshops further promoted collaboration with State agencies through information sharing. The Workshops were offered four times. Overall, there were 172 Workshop attendees. Although all State agencies were invited to attend, 32 of 34 (94 percent) of State agencies were represented at the Workshops.

The following report provides more detailed information about the background leading to the BPS Level 2 and Functional Requirements Review 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 and Functional Requirements Review 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 development of the process models. For additional information about the Level 2 Workgroups, see the [BPS Level 2 Workgroup Summary Report](#). Following the completion of Level 2 Workgroups, Level 2 Workshops (PALM 100 and PALM 200) were held with the objective of sharing previous analysis and gathering additional feedback from all agencies. For additional information about the Level 2 Workshops, see the [BPS Level 2 Workshop Summary Report](#). After concluding the Level 2 Workshops, a Process Evaluation Questionnaire (PEQ) was distributed to all State agencies to collect further feedback. An analysis of the PEQ responses will be provided in a separate report. In September 2015, all State agencies were invited to attend Level 2 and Functional Requirements Review Workshops (PALM 300). These Workshops reviewed significant updates to the Level 2 Process Flows and Narratives based on agency feedback received since the Level 2 Workshops in June 2015 and discussed common themes received in the PEQs submitted by agencies in July 2015. The Workshops also provided an overview of the planned business requirements agency review process and expectations of State agency Functional and Technical Requirements Review Coordinators.

## **Event Logistics**

BPS Level 2 and Functional Requirements Review Workshops were conducted four times during a two week period from September 22 – September 29, 2015. Each Workshop was scheduled for two and a half hours in alternating morning and afternoon sessions. Multiple Workshop offerings expanded the opportunities for State agencies to choose times that best fit their schedule. All 34 State agencies using the Florida Accounting Information Resource (FLAIR) and/or Cash Management System (CMS) were invited to attend. In addition, all attendees were asked to complete an online survey via SurveyMonkey to evaluate the event.

Overall, there were 172 registrants for the Workshops and 172 attendees. The groups of registrants and groups of attendees are not mutually inclusive; i.e., some registrants did not attend the Workshop, while some attendees did not register prior to the Workshop. In addition, 94 percent (32/34) of agencies using FLAIR and/or CMS were present at the Workshops. Agencies with the largest representation of attendees were: Florida Department of Transportation (35), Department of Revenue (20), and Department of Financial Services (16).

Please see Appendix A for additional event logistics attendance data, Appendix B for the BPS Level 2 and Functional Requirements Review Workshop supporting materials, and Appendix C for the BPS Level 2 and Functional Requirements Review Workshop Survey Summary Report.

## Appendix A: Event Logistics Data

Table 1: PALM 300 Dates and Times

<b>PALM 300</b>
Tuesday, September 22, 2015 from 10 a.m. – 12:30 p.m.
Wednesday, September 23, 2015 from 1:30 – 4 p.m.
Monday, September 28, 2015 from 1:30 – 4 p.m.
Tuesday, September 29, 2015 from 10 a.m. – 12:30 p.m.

Table 2: PALM 300 Attendance Counts

<b>Session Date</b>	<b>Registered</b>	<b>Attended</b>
Tuesday, September 22, 2015 from 10 a.m. – 12:30 p.m.	15	18
Wednesday, September 23, 2015 from 1:30 – 4 p.m.	35	32
Monday, September 28, 2015 from 1:30 – 4 p.m.	75	60
Tuesday, September 29, 2015 from 10 a.m. – 12:30 p.m.	47	62
Total	172	172

Table 3: PALM 300 Attendance by Agencies Using FLAIR and/or CMS

Agency Using FLAIR and/or CMS	Count
Agency for Health Care Administration (AHCA)	2
Agency for Persons with Disabilities (APD)	1
Agency for State Technology (AST)	2
Department of Business and Professional Regulation (DBPR)	1
Department of Children and Families (DCF)	4
Department of Economic Opportunity (DEO)	9
Department of Education (DOE)	5
Department of Elder Affairs (DOEA)	3
Department of Financial Services (DFS)	16
Department of Highway Safety and Motor Vehicles (DHSMV)	1
Department of Juvenile Justice (DJJ)	6
Department of Legal Affairs (DLA)	3
Department of Management Services (DMS)	4
Department of Military Affairs (DMA)	1
Department of Revenue (DOR)	20
Department of State (DOS)	1
Department of the Lottery (DOL)	2
Division of Administrative Hearings (DOAH)	0
Executive Office of the Governor (EOG)	4
Florida Commission on Offender Review (FCOR)	0
Florida Department of Agriculture and Consumer Services (DACCS)	4
Florida Department of Citrus (FDOC)	1
Florida Department of Corrections (DC)	5
Florida Department of Environmental Protection (DEP)	6
Florida Department of Health (DOH)	3
Florida Department of Law Enforcement (FDLE)	10
Florida Department of Transportation (FDOT)	35
Florida Department of Veterans' Affairs (FDVA)	3
Florida Fish and Wildlife Conservation Commission (FWC)	10
Florida Legislature (LEG)	3
Florida School for the Deaf and the Blind (FSDB)	2
Justice Administrative Commission (JAC)	2
Public Service Commission (PSC)	1
State Courts (SC)	2
Total	172

## **Appendix B: BPS Level 2 and Functional Requirements Review Workshop Supporting Materials**

- [BPS Level 2 and Functional Requirements Review Workshop Presentation](#)

## **Appendix C: BPS Level 2 and Functional Requirements Review Workshop Survey Summary Report**

- [BPS Level 2 and Functional Requirements Review Survey Summary Report](#)