Technical Requirements Review Kickoff Meeting Summary Report (I-OCM15)

Florida PALM
Planning, Accounting, and Ledger Management

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Executive Summary

The Florida PALM Project's Technical Requirements Review Kickoff Meeting was held on October 13, 2015 with the goal of introducing the Florida PALM Project, the Project's seven architecture principles, and the upcoming requirements review activities to agency Technical Requirements Review Coordinators. For many technical agency personnel, this kickoff meeting was their first exposure to the Florida PALM Project. This Kickoff Meeting preceded the Technical Requirements Workgroup Meetings, which were the more detailed meetings focused on the technical requirements in the Cycle 1 Business Requirements. In addition, this Kickoff Meeting served as the foundation for further collaboration with technical agency personnel through information sharing. Overall, there were 27 Kickoff Meeting attendees. All State agencies that utilize FLAIR and CMS were invited to attend (see Appendix A, Table 2). Twenty-six of 34 (76 percent) agencies were represented at the Kickoff Meeting.

The following report provides more detailed information about the background leading up to the Technical Requirements Review Kickoff Meeting, additional discussion of the meeting objectives, and concludes with event logistics information including high-level attendance statistics. Further data tables, supporting materials, and the Technical Requirements Review Kickoff Meeting Survey Summary Report are included as appendices to this report.

Background and Objectives

Agency collaboration and feedback have been a priority of the Florida PALM Project since it was launched in 2014. Throughout the 2014-2015 and 2015-2016 fiscal years, the Florida PALM Project has conducted a series of Workgroups and Workshops with functional agency personnel. These meetings focused on standardization activities that assisted in the development of many important Project deliverables including the Business Process Standardization (BPS) Level 2 Standardized Business Process Models - Version 1. This is the first time ever the State of Florida's future financial management processes have been documented end-to-end.

Standardization activities were conducted by the BPS Track with subject matter experts from various State agencies contributing to the development of standardized business process models (process flows and narratives). For additional information about the BPS Workshops and Workgroups, see the corresponding summary reports and survey summary reports posted on the Florida PALM Project's Meetings webpage.

On September 18, 2015, the Florida PALM Project's Project Director and Systems and Data Strategy (SDS) Manager presented at the Agency for State Technology's (AST) Chief Information Officer (CIO) Workgroup, a monthly meeting of State agency CIOs. At this meeting, the Project shared information about the Project's status and advised agency CIOs of the upcoming collaboration opportunity to review the Cycle 1 Business Requirements. These requirements were developed from previous agency collaboration activities, Project Aspire, and KnowledgePacks from one of the Project's support services contractors.

Since State agencies are vital stakeholders in the Florida PALM Project, the Project provided an opportunity to review and give feedback on the Cycle 1 Business Requirements. All 34 State agencies using FLAIR and/or CMS were asked to identify a Technical Requirements Review Coordinator such as the Agency CIOs or their designee. The Cycle 1 Business Requirements are the foundation for requirements that will eventually be used in the Invitation to Negotiate (ITN) and procurement activities for a Software and System Integrator (SSI). The Technical Requirements Kickoff Meeting served as a forum to provide a Project orientation to Technical Requirements Review Coordinators and set expectations for agency review of the Cycle 1 Business Requirements. In addition, the Project's seven architecture principles were reviewed, which set the strategic foundation for the State's future financial data management approach.

The Technical Requirements Kickoff Meeting was the first Florida PALM Project event tailored for technical agency personnel and is likely the first interaction technical agency personnel had with the Project Team. There were approximately 4,000 business requirements and approximately 520 of those requirements were technical. All of the requirements were shared with agencies and open for feedback. Agencies were encouraged to concentrate their review efforts on a subset of requirements identified as significant to State agencies by the Project Team. Agencies were asked to review and provide feedback on the requirements during a six week review period starting on October 12, 2015 and ending on November 25, 2015.

Event Logistics

The Technical Requirements Review Kickoff Meeting was conducted on October 13, 2015, with attendees having the option to attend in person or virtually. The Kickoff Meeting was scheduled for one and a half hours for an afternoon session. Meeting invitations to attend were extended only to the agency CIO-identified Technical Requirements Review Coordinators. Following the Kickoff Meeting, the 27 attendees were asked to complete an online survey via SurveyMonkey.

Those 27 Kickoff Meeting attendees represented 76 percent (26/34) of State agencies using FLAIR and/or CMS, and two attendees came from the same agency.

Please see Appendix A for additional event logistics attendance data, Appendix B for the Technical Requirements Review Kickoff Meeting supporting materials, and Appendix C for the Technical Requirements Review Kickoff Meeting Survey Summary Report.

Appendix A: Event Logistics Data

Table 1: Kickoff Meeting Attendance Counts

Workshops	Invited	Attended
Tuesday, Oct. 13, 2016, 1:30 – 3 p.m.	34	27

Table 2: Attendance by Agencies Using FLAIR and/or CMS

Agency Using FLAIR and/or CMS	Count
Agency for Health Care Administration (AHCA)	1
Agency for Persons with Disabilities (APD)	1
Agency for State Technology (AST)	0
Department of Business and Professional Regulation (DBPR)	1
Department of Children and Families (DCF)	1
Department of Economic Opportunity (DEO)	1
Department of Education (DOE)	1
Department of Elder Affairs (DOEA)	0
Department of Financial Services (DFS)	1
Department of Highway Safety and Motor Vehicles (DHSMV)	1
Department of Juvenile Justice (DJJ)	2
Department of Legal Affairs (DLA)	1
Department of Management Services (DMS)	1
Department of Military Affairs (DMA)	0
Department of Revenue (DOR)	1
Department of State (DOS)	1
Department of the Lottery (DOL)	0
Division of Administrative Hearings (DOAH)	0
Executive Office of the Governor (EOG)	1
Florida Commission on Offender Review (FCOR) *Florida Department of Corrections (DC) represents FCOR for the Technical Requirements review activities*	0
Florida Department of Agriculture and Consumer Services (DACS)	1
Florida Department of Citrus (FDOC)	1
Florida Department of Corrections (DC)	0
Florida Department of Environmental Protection (DEP)	1
Florida Department of Health (DOH)	1
Florida Department of Law Enforcement (FDLE)	1
Florida Department of Transportation (FDOT)	1
Florida Department of Veterans' Affairs (FDVA)	1
Florida Fish and Wildlife Conservation Commission (FWC)	1
Florida Legislature (LEG)	1
Florida School for the Deaf and the Blind (FSDB)	1
Justice Administrative Commission (JAC)	0
Public Service Commission (PSC)	1
State Courts (SC)	1
Total	27

Appendix B: Technical Requirements Review Kickoff Meeting Materials

- Technical Requirements Review Kickoff Meeting Presentation

Appendix C: Technical Requirements Review Kickoff Meeting Survey Summary Report

- Technical Requirements Review Kickoff Meeting Survey Summary Report

05/10/2016