

Project Overview & Accomplishments

- ✓ Launched the new Florida [PALM Project Website](#)ⁱ
- ✓ Conducted third Executive Steering Committee (ESC) meeting on July 27, 2016 (meeting materials are posted to the Florida PALM website)
- ✓ Kicked-off the Business Case for Maintaining Agency Business Systems
- ✓ Executed the Organizational Change Management Support Services Contract

Business Process Standardization (BPS)

The BPS Team welcomed a new member, the Procurement to Payment Co-Lead, on June 30, 2016. The BPS Team also continued to support the development of the Software and System Integrator (SSI) Invitation to Negotiate (ITN). Activities include development of documents to be included with the ITN and on processes and tools to support the procurement activities.

Business Requirements

Through the deadline on July 8, 2016, the BPS Team received questions or recommended updates from four agencies regarding the Cycle 3 Budget Business Requirements. The BPS Team submitted and the Project accepted the Cycle 3 Business Requirements on July 20, 2016.

To facilitate the ESC's review of business requirements, spreadsheets containing Parts 1 (Cycle 2) and 2 (Cycle 3) and a Word document template for feedback were posted on the [Florida PALM website](#)ⁱⁱ on July 14 and July 21, 2016. Additional documents posted to support ESC review include business requirements definitions and a business requirements crosswalk.

Standardized Business Process Models

Through the deadline on July 22, 2016, the BPS Team received questions or recommended updates from four agencies regarding the draft Budget Process Model. The Team is finalizing the edits to the updated Level 2 Standardized Business Process Models – Version 2.0 for submission in August.

Organizational Change Management (OCM)

The OCM Team welcomed a new member, the OCM Manager, on June 28, 2016. The OCM Team also selected and will be welcoming the new OCM support services contractor to the Team on August 1, 2016. The Team continued to provide development support to the Project for the SSI ITN.

Project Management Office (PMO)

The PMO Team selected Computer Aid, Inc. and executed the contract for the Business Case for Maintaining Agency Business Systems (Business Case) identified in Attachment 2 of the FLAIR Study. Computer Aid, Inc. staff joined the Project on July 1, 2016 and have begun collaboration with Agencies to complete the Business Case.

The PMO Team continues to lead efforts to review and update the SSI ITN solicitation documents. The draft of the documents has been provided to Project Sponsors, DFS Purchasing and Legal, and outside legal counsel.

Systems and Data Strategy (SDS)

The SDS and OCM Teams successfully transitioned the Project's Website to a new platform increasing the functionality and improving the overall experience for users.

Data Management Plan

The SDS Team, including the Project's Enterprise Architect (EA) Support Contractor, continued collaboration with the Agency for State Technology and DFS divisions to develop the Project's Data Management Plan (DMP). The Team is soliciting comments on the DMP from Florida State University, Florida Agricultural and Mechanical University, Gartner, and Florida Financial Management Information System partners (LAS/PBS, MyFloridaMarketPlace, and People First systems staff).

Business Case for Maintaining Agency Business Systems

The SDS Team is also lead on the Business Case for Maintaining Agency Business Systems. Section 6, Appropriation 2317A of the 2016 General Appropriations Act (GAA) instructed the Department of Financial Services to contract with a third-party to complete a Business Case for Maintaining the agency business systems identified in [Attachment 2ⁱⁱⁱ](#) of the [FLAIR Study^{iv}](#). Computer Aid, Inc. has been selected to provide the Business Case. Agencies were invited to attend the Business Case Kickoff on July 21, 2016, where the Project's Business Case Team described the goals for the Business Case and the process for collaborating with agencies.

The Business Case will include:

- a) A detailed description of the functionality provided by the agency business system,
- b) Confirmation that the agency business system's functionality is not planned to be included in the replacement of FLAIR and CMS, and
- c) Documentation, including Federal and State law, rule, or policy, which validates that the agency is required to maintain the functionality currently provided by the agency business system instead of modifying its business processes.

The Business Case will not include:

- a) Determinations of the feasibility to keep, replace, or remediate any agency business system,
- b) Recommendations to keep, replace, or remediate any agency business system, or
- c) An effort to gather additional Florida PALM Business Requirements.

An email was sent on Monday, July 25, 2016 to Agency Administrative Services Directors and Chief Information Officers requesting completion of an attached Agency Systems Functionality Profile (Profile) for their agency's business systems that interface with FALIR and/or CMS by August 5, 2016. The Profile included these questions:

1. What is the name of the agency business system?
2. What acronym is used when referring to the agency business system?

3. What were the financial functions identified for the agency business system within the FLAIR Study?
4. What does the agency business system interface with?
5. Is the agency still using the agency business system? If no, there is no need to answer the remaining questions for this business system. If yes, please continue.
6. Are there plans to discontinue use of the agency business system?
7. Which Florida PALM Business Requirements Category(ies) best describe(s) the agency business system?
8. Which Florida PALM Business Requirements Sub-Category(ies) best describe(s) the agency business system?
9. Provide a detailed description of the agency business system (considering the following leading questions):
 - a. How would you describe this system to a new employee?
 - b. What business need is fulfilled by the agency business system?
10. Is there documentation that validates a Federal requirement that the agency is required to maintain the functionality currently provided by the agency business system instead of modifying its business processes?
11. Is there documentation that validates a Florida State law or rule that the agency is required to maintain the functionality currently provided by the agency business system instead of modifying its business processes?
12. Is there documentation that validates a policy that the agency is required to maintain the functionality currently provided by the agency business system instead of modifying its business processes?
13. Is there any other information you would like to provide for the agency business system?

The Business Case Team will be conducting interviews with each Agency as needed following receipt of the completed Profiles. Agency interviews may be canceled if the Business Case Team has no further questions following review of the submitted Profile.

For more information about the Business Case, please visit the [Business Case for Maintaining Agency Business Systems webpage](#)^v on the new [Florida PALM website](#)^{vi}.

ⁱ <https://www.myfloridacfo.com/floridapalm/>

ⁱⁱ <https://www.myfloridacfo.com/floridapalm/resources/business-requirements/>

ⁱⁱⁱ https://www.myfloridacfo.com/floridapalm/wp-content/uploads/2016/06/FS4_140409-DOF05-Final-FLAIR-Study-D5-dAttach2-v100.pdf

^{iv} <https://www.myfloridacfo.com/floridapalm/resources/flair-study/>

^v <https://www.myfloridacfo.com/FloridaPALM/resources/business-case/>

^{vi} <https://www.myfloridacfo.com/floridapalm/>