OVERVIEW OF FLORIDA PALM

CHIEF TECHNOLOGY OFFICER (CTO) WORKGROUP
AUGUST 18, 2017
Overview of Florida PALM

Overview of FLAIR

- Florida Accounting Information Resource (FLAIR) was implemented 30 years ago to provide accounting resources to State agencies.
- FLAIR processes $90 billion in payments annually (including $3.5 billion in payroll).
- FLAIR has over 16,000 users statewide.
- FLAIR limitations include:
  - Paper intensive processing
  - No predictability/forecasting
  - Lack of availability of IT support
Overview of Florida PALM

Project Phases

- Current Phase –
  - Planning, Process Standardization, Procurement, and Readiness for Implementation
  - FY 17/18 will mark 4th year of Project

- 1st Implementation Phase – Implement Core Functionality over an estimated 5 years (according to Business Case)

- Subsequent Implementation Phase(s) – Implement Expanded Functionality over an estimated 5 years (according to Business Case)
Overview of Florida PALM

Core Principles

The Florida PALM Project operates on three core principles:

1. Create a realistic plan to complete the FLAIR and CMS replacement project
2. Incorporate a number of smaller objectives along a deliberate timeline
3. Acknowledge the statewide aspect of the project and the impact to the other Florida agencies
Overview of Florida PALM

Project Organization

- Project is composed of State FTEs and contract staff
- Chief of Staff serves as Executive Sponsor
- Deputy CFO, Director of Accounting & Auditing, Director of Treasury, and CIO serve as Project Sponsors
- Governance is defined by two tiers
  - Project Director
  - 15-member Executive Steering Committee chaired by Project Executive Sponsor
Overview of Florida PALM
Completed Milestones

- Staffed Project FTEs across four teams encompassing project management, people, process, and technology
- Secured contract support staff across four teams and independent verification and validation services
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Completed Milestones

- Conducted meetings with all 34 agencies that currently use FLAIR and CMS to establish and obtain approval on standardized business processes across ten financial process areas.
- Assembled an Executive Steering Committee made up of 15 members from 7 different agencies and began conducting public meetings.
Overview of Florida PALM
Completed Milestones

- Obtained approval of business requirements based on statewide-developed standardized business processes through governance process in September 2016
- Obtained approval of solicitation documents for the Software and System Integrator (SSI) through governance process in October 2016
- Released solicitation in November 1 2016 and vendor responses were received in January 2017
- Evaluation was completed in July 2017
Overview of Florida PALM

Next Steps

- Conduct procurement activities which are currently expected to occur through remaining of calendar year 2017 with a contract execution in early 2018
- Continue executing readiness activities through the four critical dimensions of project management, people, process, and technology in preparation for the implementation phases
- Identify additional collaboration opportunities with agencies and other public sector entities that have completed similar implementations
Contact Information

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