

Florida **PALM**

Planning, Accounting, and Ledger Management



Executive Steering Committee Meeting

Department of Revenue
Building 2, Room 1250
January 25, 2017



Roll Call and Opening Remarks

Facilitator: Robert (Budd) Kneip, Chair



Review of December 14, 2016 Meeting Minutes

Facilitator: Melissa Turner



Florida PALM Project Update

Facilitators: Melissa Turner, Carolyn Hicks, &
Danielle Kosberg



Florida PALM Project Update

Budget

- ▶ The Project completed activities to recognize savings for July to December 2016 and revise projections for January to June 2017, resulting in a one-time, baseline adjustment of (\$2,334,877)

FY 2016-2017 Spend Plan Summary

As of December 31, 2016

Category	Projected	Incurred	Remaining Balance	% Remaining
Salaries and Benefits	\$2,888,550.00	\$1,206,340.84	\$1,682,209.16	58%
Special Category	\$3,572,105.00	\$1,567,262.74	\$2,004,842.26	56%
Risk Management Insurance	\$3,504.00	\$3,504.00	\$0	0%
DMS Transfer	\$8,230.50	\$4,193.50	\$4,037.00	49%
Total	\$6,472,389.50	\$2,781,301.50	\$3,691,088.42	57%



Florida PALM Project Update

Risks and Issues

7

- ▶ Closed one risk since last ESC meeting related to onboarding contractor with ERP experience
- ▶ There were no new risks or issues reported since last ESC meeting
- ▶ Risks with high probability and impact will continue to be shared via monthly status reports and discussed (if necessary or as requested) with the ESC



Florida PALM Project Update

Scope (Pre-DDI Activities)

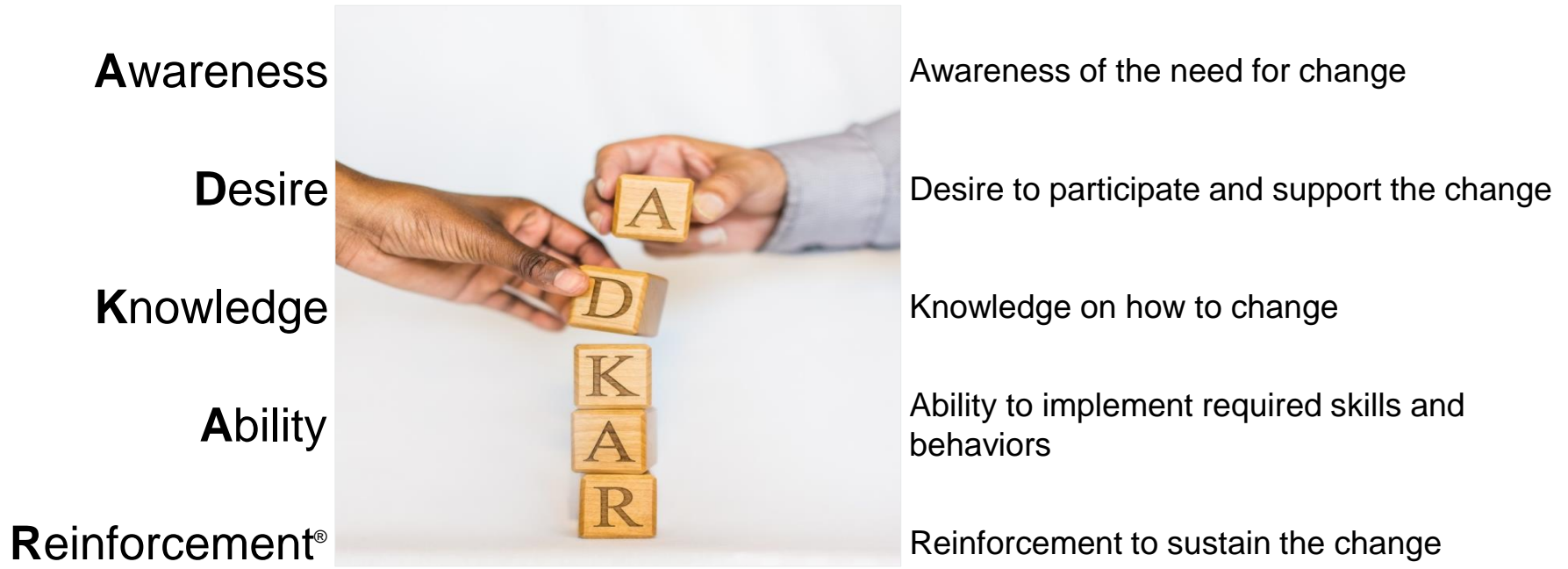
- ▶ Began preparing for knowledge transfer to Project Team on Level 2 Standardized Business Process Models
- ▶ Began analyzing new DecisionDirector tool for fit to support revised vendor responses to requirements during negotiation
- ▶ Updated components of the Project Management Plan
- ▶ Updated Project Charter to align with ITN
- ▶ Continued evaluating Project Support Tools
- ▶ Continued working on updates to the Data Management Plan (DMP)



Florida PALM Project Update Scope (DDI Readiness)

The five building blocks of successful change

Prosci® ADKAR® Model



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Florida PALM Project Update

Schedule (DDI Readiness)



ID	Task Name	Feb 2017				Mar 2017				Apr 2017				May 2017				Jun 2017				Jul 2017				Aug 2017			
		2/5	2/12	2/19	2/26	3/5	3/12	3/19	3/26	4/2	4/9	4/16	4/23	4/30	5/7	5/14	5/21	5/28	6/4	6/11	6/18	6/25	7/2	7/9	7/16	7/23	7/30	8/6	8/13
1	Agency Profiles	[Task 1: Agency Profiles - Active from Feb 5 to Jun 18]																											
2	OCM Success Measures	[Task 2: OCM Success Measures - Active from Feb 12 to Jun 25]																											
3	Change Champion Strategy	[Task 3: Change Champion Strategy - Active from Mar 12 to Jun 11]																											
4	OCM Knowledge Transfer	[Task 4: OCM Knowledge Transfer - Active from Apr 23 to Aug 27]																											



Florida PALM Project Update

Schedule (DDI Readiness)

Task	Objectives	Proposed Activities
<p style="text-align: center;">Agency Profiles</p>	<ul style="list-style-type: none"> ▶ Expand information gathered as part of the Overview of the Current Program (OCP), providing a more detailed Agency breakdown ▶ Update FLAIR and CMS use data on each Agency 	<ul style="list-style-type: none"> ▶ Review and update draft Agency Profiles templates ▶ Gather data to be provided by OIT, A&A, and Treasury ▶ Consolidate data into new profiles by Agency – beginning with a “pilot profile” for DFS ▶ Package profiles for purposes of supporting vendor discussions during negotiations process
<p style="text-align: center;">OCM Success Measures</p>	<ul style="list-style-type: none"> ▶ Establish OCM metrics that link to Florida PALM Project benefits, scope, and the future state vision ▶ Propose a baseline to measure success and set expectations 	<ul style="list-style-type: none"> ▶ Conduct collaborative working sessions with all Project tracks to identify and align with the most critical OCM metrics to monitor ▶ Provide metrics to negotiators to consider for vendor discussions during negotiations process



Florida PALM Project Update

Schedule (DDI Readiness)

Task	Objectives	Proposed Activities
<p>Change Champion Strategy</p>	<ul style="list-style-type: none"> ▶ Develop an approach for identifying and engaging select representatives of varied stakeholder groups ▶ Clarify Change Champion roles, responsibilities, and structure 	<ul style="list-style-type: none"> ▶ Review existing Change Champion documentation from prior State projects and gather input from Project Leadership ▶ Develop strategy document to include Change Champion participation requirements ▶ Share Change Champion approach with negotiators to consider for vendor discussions during negotiations process
<p>OCM Knowledge Transfer</p>	<ul style="list-style-type: none"> ▶ Facilitate ongoing knowledge transfer and collaboration across all tracks ▶ Enhance Project Team knowledge of change management principles 	<ul style="list-style-type: none"> ▶ Document and share leading practice perspectives on change management – including ADKAR principles ▶ Research change management techniques used by other FFMIS partners and lessons learned from other State initiatives ▶ Prepare Team members to serve as advocates and change agents for the Project within their respective areas of responsibility



Florida PALM Project Update Schedule (DDI Readiness)

- ▶ Collaboration activities included visits to:
 - ▶ Florida State University
 - ▶ State of Alabama
 - ▶ State of Georgia
 - ▶ State of Mississippi
 - ▶ Tallahassee Community College



Florida PALM Project Update

Schedule (SSI ITN)

Solicitation Activities (11/1/2016 – 1/24/2017)

- ▶ Posted ITN (**Complete**)
- ▶ Conduct Vendor Q&A (**Complete**)
- ▶ Develop Evaluation Preparation (**Complete**)
- ▶ Develop Evaluation Training/Templates/Reports (**Complete**)
- ▶ Appoint Evaluators (**Complete**)
- ▶ Conduct Evaluator Training (**Complete**)
- ▶ Obtain Vendor Responses (**Complete**)



Florida PALM Project Update

Schedule (SSI ITN)

Evaluation Activities (1/25/2017 – 4/17/2017)

- ▶ BPS Support Services Contractor review of DD2 reports (*In progress*)
- ▶ Administrative review of replies (*In progress*)
- ▶ Evaluation Team begin review of replies
- ▶ Respondents conduct software demonstrations and team presentations
- ▶ Evaluators complete scoring
- ▶ Scores are compiled to establish competitive range



Florida PALM Project Update

Schedule (SSI ITN)

Negotiation Activities (4/18/2017 – 2/20/2018)

- ▶ Appoint Negotiators
- ▶ Negotiation Preparation
- ▶ Conduct Negotiator strategy sessions
- ▶ Conduct Negotiations
- ▶ Post Intent to Award
- ▶ Execute contract



Independent Verification & Validation (IV&V) Assessment

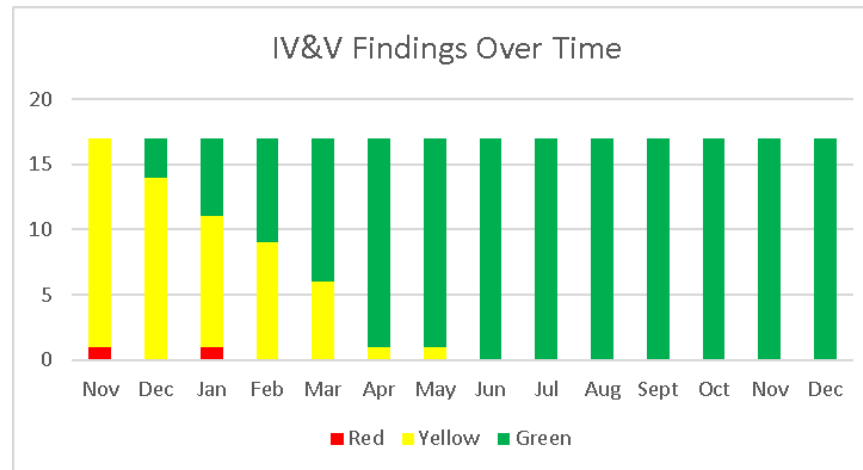
Facilitator: Brian Eppig



IV&V Assessment

Results – December 2016

- ▶ Focus on Procurement Execution
 - Evaluation Preparation
- ▶ Project and DDI Readiness
 - OCM Detail



IV&V Assessment

Upcoming Focus

- ▶ Managing expectations during procurement
- ▶ Continue to focus on DDI Readiness
 - OCM Strategy execution
 - Managing impacts of procurement support
 - Planning for ramp-up of DDI phase



Upcoming Activities

Facilitator: Melissa Turner



Upcoming Activities

- ▶ **Support SSI ITN**
 - Implement tool to support tracking of changes to requirements during negotiation
- ▶ **Execute DDI readiness activities across tracks**
 - Conduct knowledge transfer to Project Team on Level 2 Standardized Business Process Models
 - Execute activities identified as part of the OCM Pre-SSI Strategic Plan



New Business & Open Discussion

Facilitator: Melissa Turner



Next Meeting

Wednesday, February 22

To Be Confirmed By ESC



Contact Information

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