Legend: Projects Completed Projects Anticipated to be Complete within 30 days

Area	Project	Status
Planning, Coordination, and Oversight	Strategic Planning Office (SPO)	In progress and on schedule.
	Oversight (IV&V)	In progress and on schedule.
	System and Software Integration (SSI)	In progress and on schedule. Business Strategy being developed. See System and Software Integration Operational Work Plan.
Software	Adjudication Workflow Management	In progress and on schedule. Development is ongoing. See Adjudication Workflow Management Operational Work Plan.
	ChatBot	In progress and on schedule. Testing underway. See ChatBot Operational Work Plan.
	Rules Catalog	In progress and on schedule. All known business rules analyzed. Project closeout underway. See Rules Catalog Operational Work Plan.
	Appeals Workflow Management	In progress and on schedule. 34% of the tickets have been completed. See Appeals Workflow Management Operational Work Plan.
	Incremental CX/UX Mobile-Responsive Transformation	CX/UX in progress and back on schedule. Mobile-responsive user interface successfully launched. See CX/UX Operational Work Plan.
	Communications	In progress and on schedule. See Communications Operational Work Plan.
	Document Imaging System	In progress and on schedule. See Document Imaging System Operational Work Plan.
Data and Analytics	Reporting	In progress and on schedule. 37% of in-scope reports have been completed or retired. See Reporting Operational Work Plan.
	Product and Data Management	In progress and back on schedule. See Product and Data Management Operational Work Plan.

Are there any scope changes?
There were no scope changes this reporting period.

Is the project currently within budget?
The project is currently under budget.

Do you expect the project to remain within budget?
Yes

If the project is not on schedule, briefly explain why and what the agency is doing to bring the project back on schedule.
The Program is on schedule.

Major Project Tasks and Activities Accepted or In Progress this Reporting Period

- [Planning, Coordination, and Oversight] System and Software Integration: This project includes leveraging the expertise of a third-party services provider with experience in strategic planning, system design, system development, and system integration for large multi-component system modernization efforts to ensure the Department's various modernization projects work as intended to deliver an enhanced user experience.

  - During this reporting period, the Contractor focused on developing the Business Strategy deliverable, which is a tool used to plan the future of the Reemployment Assistance program through Continuous Modernization projects and ongoing maintenance and operations.
- [Software] Adjudication Workflow Management: This project will help automate the assignment of adjudication cases to adjudicators and eliminate a manual process. This project addresses one of the recommendations made during the Business Process Optimization project that was closed during the two-year Reemployment Assistance Modernization Program Roadmap.
  - This reporting period, development work continued to support a streamlined process for reviewing each adjudication issue and distributing the associated determination, which helps support the process of determining if a claimant is eligible to receive Reemployment Assistance benefits.
- [Software] ChatBot: This project includes providing Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim-specific information without requiring a call to the Reemployment Assistance Contact Center. This allows more time for Contact Center agents to assist individuals with more complex issues, including those with barriers such as access to a computer.
  - This reporting period, the Bot was fully developed to be able to answer users' frequently asked questions. The Department anticipates that testing for English, Spanish, and Haitian Creole will be complete in the next reporting period.
- [Software] Rules Catalog: This project is designed to further enhance the Department's documentation for Reconnect by capturing all the rules that govern the administration of the Reemployment Assistance program. This project will add information about the complexity of each business rule, which will aid the Department in forecasting the need for implementing a Business Rules Engine as Reconnect is further modularized.
  - This reporting period, project closeout continued.
- [Software] Appeals Workflow Management: This project is designed to implement new features and address functionality that is not currently working to streamline the Appeals workflow that is used by Department staff to conduct Appeals hearings and issue determinations. This will eliminate manual processes and expedite the Appeals process.
  - For this reporting period, of the 67 tickets in-scope for this project, 23 are complete, 12 are being developed and tested, and 32 have not yet been started.
- [Software] Incremental CX/UX Mobile Responsive Software Transformation: This project includes optimizing the existing System and developing a user-friendly front-end for Reemployment Assistance claimants that is also mobile-friendly. The transformation will occur incrementally to ensure all System users benefit from System optimization, with a focus on enhancing the claimant experience first.
  - During this reporting period, the mobile-responsive user interface was successfully launched which included the entire initial claim application and 28 of 90 initial claim fact-finding questionnaires. The team will continue to develop and test the remaining fact-finding questionnaires to further enhance the user experience as part of the regular release of enhancements.
- [Software] Document Imaging System: This project is designed to remove the manual processes that are required for the Department to process physical mail and faxed documents claimants and employers submit for their Reemployment Assistance claim by automatically attaching these documents, once scanned, to the correct claim in Reconnect so that claims can be processed efficiently and accurately.
  - This reporting period, the kick-off was held, along with discovery sessions for documenting current state workflows for receiving and routing physical mail and faxes.
- [Data and Analytics] Reporting: This project includes migrating, developing, and validating all internal Reemployment Assistance performance reports from Reconnect to the Data. The data warehouse provides the Department with standardized data and reduces the need for staff intervention for future reporting activities.

- For this reporting period, of the 379 reports in-scope for this project, 46 are complete, 43 are being developed and tested (51 reports were de-duplicated and have been merged into 23 reports), 94 will be retired, and 196 have not yet been started.

- [Data and Analytics] Product and Data Management: This project is designed to mature the Department's data management, planning, and governance processes for Reemployment Assistance data to promote data sharing, interoperability, and reduce both the size of and costs affiliated with Reemployment Assistance's data.
  - This reporting period, the Department published the updated Reconnect data catalog and data dictionary for internal use. The Department anticipates routing the Fraud Initiative Rating and Rules Engine data catalog and data dictionary for review and approval during the next reporting period.

OPERATIONAL WORK PLAN
FOR
CHATBOT

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON JANUARY 30, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 3
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 4
G. KEY STAKEHOLDERS 5
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 5
III. RESOURCE LOADED PROJECT SCHEDULE 7
IV. PROJECT SPENDING PLAN 8
V. PROJECT ORGANIZATION AND METHODOLOGY 9
A. PROJECT ORGANIZATIONAL CHART 9
B. PROJECT ROLES AND RESPONSIBILITIES 9
C. PROJECT MANAGEMENT METHODOLOGY 11
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 12
VII. PROJECT RISK MANAGEMENT PLAN 12
VIII. CAPACITY PLAN 12

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

FloridaCommerce is enhancing the claimant experience by launching a ChatBot solution.

The ChatBot solution provides Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim specific information. This technology will help deflect calls to the Reemployment Assistance Contact Center, so that agents are more available to the callers who truly need agent assistance.

A. Scope Statement

FloridaCommerce's existing contact center vendor will deploy one AI conversational bot to the floridajobs.org website to help Reemployment Assistance end users obtain answers to frequently asked questions and claim-specific information related their claims to help increase self-service opportunities and deflect calls from the Reemployment Assistance Contact Center. If the ChatBot cannot answer the end user's question, an opportunity to escalate to one of three Contact Center agent queues will be provided.

In Scope

- The existing contact center vendor's professional services team will develop a custom chat provider for escalation to Customer's Genesys CX account. Translation will be provided within the AI Chatbot account for English, Spanish, and Haitian-Creole. Escalation to Genesys CX will be provided for each language. Training will be provided for AI administrators, content creators and reporting analysts.
- FloridaCommerce will administer ChatBot content within a single knowledge base, specifically, English. The knowledge base articles will reside in the AI ChatBot solution. The translation solution will translate the English knowledge base content into Spanish or Haitian-Creole. Customer responses will be translated from Spanish or Haitian-Creole to English for solution consumption and processing.

Out of Scope

- Languages besides English, Spanish, or Haitian-Creole.

B. Project Objectives and Business Benefits

The ChatBot solution provides Reemployment Assistance claimants an additional self-service option to gain answers to frequently asked questions and claim specific information. This technology will help deflect calls to the Reemployment Assistance Contact Center, so that agents are more available to the callers who truly need agent assistance.

C. Critical Success Factors

The following factors are necessary for success.

- FloridaCommerce staffing resources are available to work on the project.

- Performance of the solution meets FloridaCommerce requirements.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
November 2, 2023	Project Kick-off with vendor
January 14, 2024	FAQ User Acceptance Testing
January 28, 2024	IVR development complete
March 29, 2024	FAW and IVR ready for production
May 5, 2025	Agent Escalation development complete

E. Major Deliverables

Major Deliverable	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Project Schedule	The PM will work with the vendor to create the project schedule
Test Plan	Vendor will work on the develop a testing plan and strategy to be used during User Acceptance Testing.
User Accepting Testing	User Acceptance Testing will commence once the development has been completed by the vendor. The result of User Acceptance Testing will be the sign off on the executed test plan.
Go Live	Deployment of the solution into production

F. Major Milestones

The project cannot be completed without the milestones listed below. Transparency and inclusion in all major milestones and deliverables will help build and maintain an accurate schedule.

Major Milestone	Milestone Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail of the scope of the project
Project Closeout Report	The PM provides the Project Closeout Report

G. Key Stakeholders

The stakeholders listed below are critical in providing direction, especially with a project that will have a large amount of discovery. The project sponsors will be valuable when issues that require executive decisions are needed, and when there may be negotiations for keeping and purging older data based on its value.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Warren Lenfant	Project Owner
David Sinclair	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. ChatBot solution will be available in English, Spanish and Haitian-Creole.
2. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
3. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
4. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
5. The Project Sponsor will be responsive and prepared to make decisions regarding the project cost and scope.
6. The solution must be FedRamp compliant.

Project Constraints

1. Limited Knowledge of FloridaCommerce claims processing could slow the project down.
2. Hardware that needs to be provided by FloridaCommerce could be slower due to staffing constraints.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	**01-Chatbot**
1.1	**Initiation**
1.1.1	**Risk and Complexity Assessment**
1.1.2	**PM Deliverable: Project Charter**
1.1.3	**Project Charter complete**
1.1.4	**Stakeholders Register**
1.1.5	**Project Kickoff Meeting**
1.1.6	**Conduct Lessons Learned Meeting**
1.2	**Initiation Phase complete**
1.3	**Planning**
1.3.1	**PM Deliverable: Resource Plan**
1.3.2	**Resource Plan Complete**
1.3.3	**PM Deliverable: Project Schedule**
1.3.4	**Project Schedule complete**
1.3.5	**PM Deliverable: Project Management Plan**
1.3.6	**Project Management Plan complete**
1.3.7	**PM Deliverable: Project Budget**
1.3.8	**Project Budget complete**
1.3.9	**PM Deliverable: Project Spending Plan**
1.3.10	**MILESTONE: Project Spending Plan complete**
1.3.11	Complete Impact Analysis
1.3.12	**Requirements:**
1.3.13	Complete the Planning Gate R&C Assessment
1.3.14	**Conduct Lessons Learned Meeting**
1.4	**MILESTONE: Planning Phase complete**
1.5	**Execution**
1.5.4	**Record Level Detail Requirements Gathering Completed**
1.5.5	**Approve Requirements**
1.5.6	**Conduct Lessons Learned Meeting**
1.5.7	**Transition to Operations**
1.6	**Execution Phase complete**
1.7	**Monitoring and Controlling**
1.7.1	Manage Project Schedule
1.7.2	Manage Project Costs
1.7.3	Manage Project Scope
1.7.4	Manage Project Risks
1.7.5	Manage Project Issues
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity

WBS	Task Name
1	**01-Chatbot**
1.1	**Initiation**
1.1.1	**Risk and Complexity Assessment**
1.1.2	**PM Deliverable: Project Charter**
1.1.3	**Project Charter complete**
1.1.4	**Stakeholders Register**
1.1.5	**Project Kickoff Meeting**
1.7.9	Conduct Regularly scheduled Status Meetings
1.7.10	Prepare Regularly scheduled Status Reports
1.8	**Monitoring and Controlling Phase Complete**
1.9	**Project Closeout**
1.9.1	**PM Deliverable: Project Closeout Report**
1.9.2	**Project Closeout Report complete**
1.9.3	**Conduct Lessons Learned Meeting**
1.1	**Closeout Phase complete**

III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

WBS	Task Name	% Complete	Duration	Start	Finish
1	**01 ChatBot**				
1.1	**Initiation**	**100**		**7/15/23**	**7/30/23**
1.1.1	**Risk and Complexity Assessment**	**100**		**7/26/23**	**7/30/23**
1.1.2	**PM Deliverable: Project Charter**	**100**		**7/26/23**	**7/30/23**
1.1.3	**Project Charter complete**	100		**7/26/23**	**7/30/23**
1.1.4	**Stakeholders Register**	**100**		**7/26/23**	**7/30/23**
1.1.5	**Project Kickoff Meeting**	**100**		**7/26/23**	**7/30/23**
1.1.6	**Conduct Lessons Learned Meeting**	**100**		**7/26/23**	**7/30/23**
1.2	**Initiation Phase complete**			**7/26/23**	**7/30/23**
1.3	**Vendor Contract is Executed**	**100**		**10/23/23**	**10/23/23**
1.5	**Execution Begins**	**15**		**11/2/23**	**1/25/24**
1.7	**User Acceptance Testing FAQ**	**0**		**1/14/24**	**2/16/24**
1.8	**Monitoring and Controlling**	**0**		**1/29/24**	**6/28/24**

IV. Project Spending Plan

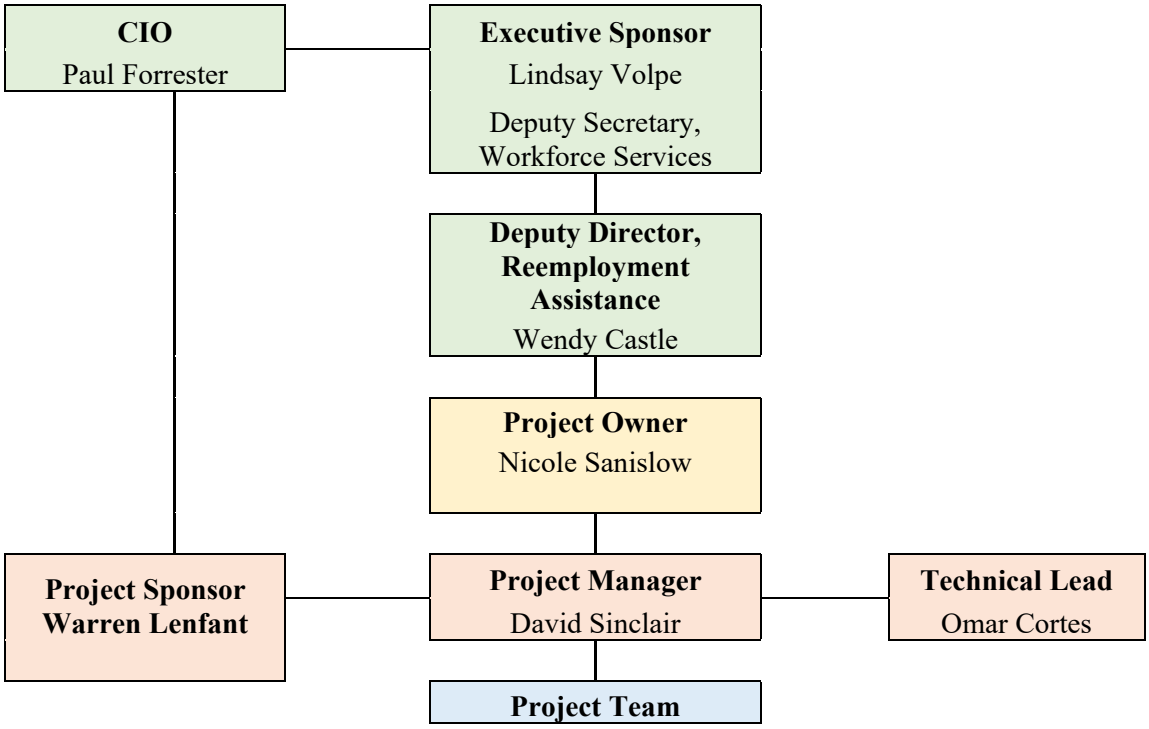
The ChatBot project has existing resources assigned, therefore, there is no spend for this project.

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: $762,000	*Software: $532,848*
Other OpEx (Vendor Deliverables):$0.00	*Other OpEx (Vendor Deliverables):$0.00*
Other CapEx: $0.00	*Other CapEx: $0.00*

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project

Name	Project Role	Responsibility
		• Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Wendy Castle	Project Sponsor/Director Reemployment Assistance	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project
Nicole Sanislow	Project Owner	• Represents the interests of the stakeholders • Monitors project progress • Approves project definition • Approves plans and schedules • Validates project deliverables meet expectations • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
David Sinclair	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
Omar Cortes	Technical Lead	• Responsible for assisting the team(s) in coordinating the most appropriate solution • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team. • Has historical knowledge of the Contact Center for Reconnect

Name	Project Role	Responsibility
Warren Lenfant	Business Sponsor	• Responsible for the support for the PM as it is related to the business need and impact of the project • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team. • Has years of historical knowledge of the Contact Center Solutions for Reconnect

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project may need Organizational Change Management. This will be determined as the scope and vendor are determined. Once determined we will build a plan related to Change Management.

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

This project capacity plan will be built with the vendor to determine the best way to measure capacity load of the ChatBot solution.

OPERATIONAL WORK PLAN
FOR
RULES CATALOG

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON FEBRUARY 5, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 3
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 4
G. KEY STAKEHOLDERS 4
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 5
III. RESOURCE LOADED PROJECT SCHEDULE 6
IV. PROJECT SPENDING PLAN 6
V. PROJECT ORGANIZATION AND METHODOLOGY 6
A. PROJECT ORGANIZATIONAL CHART 6
B. PROJECT ROLES AND RESPONSIBILITIES 7
C. PROJECT MANAGEMENT METHODOLOGY 9
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 9
VII. PROJECT RISK MANAGEMENT PLAN 10
VIII. CAPACITY PLAN 10

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

As a part of the Florida Department of Commerce's (FloridaCommerce) Modernization Program, the FloridaCommerce Rules Catalog will be updated to capture additional business rules within the Reconnect system (the System). The completion of the Rules Catalog project will document rules to allow ease of tracking, reviewing, and identifying changes within the System.

A. Scope Statement

The Rules Catalog Project will enable FloridaCommerce to identify and document System rules to develop a Business Rules Catalog. A completed rules catalog will allow FloridaCommerce to track and maintain system rules in one central location.

In Scope

- Update the Rules Catalog to incorporate all rules that govern the Reemployment Assistance program within Reconnect, excluding CX/UX business rules.
    - Include the type of rule and number of System users impacted by the rule, if applicable.
    - Maintain the catalog within the Central Repository.
    - Include the complexity of each business rule, as low, medium, or high.
    - Order rules by frequency of change, from highest to lowest.

Out of Scope

- Migrate rules into a Rules Engine product.
- Identify CX/UX business rules.

B. Project Objectives and Business Benefits

The Rules Catalog project was developed following the completion of the Rules Engine project to complete the development of a Business Rules Catalog. The Rules Catalog documents business rules within the System, and allows business rules to be documented, tracked, and maintained in one central location.

Project Objective	Business Benefit
Inventory business rules.	FloridaCommerce will have a complete catalog of System business rules.

C. Critical Success Factors

The following factors are necessary for success.

- Timely and high-quality achievement of major milestones/deliverables.
- Usable Business Rules Catalogs.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
August 2023	Project starts, confirm project scope and identify project team members.
September 2023 – March 2024	Identification and prioritization of business systems rules, and creation of catalogs.
April 2024	Finalize and approve catalogs.
April 2024	Closeout Phase complete; project complete.

E. Major Deliverables

Major Deliverable	Deliverable Description
Project Charter	Complete and submit a detailed project charter to FloridaCommerce.
Project Management Plan	Create and approve Project Management Plan.
Weekly Status Meetings	Host weekly status meetings with project team.
Identification of Business Rules	Project team identifies business system rules for incorporation into the Rules Catalog.
Business Rules Catalog	The project team shall update and create additional Business Rules Catalogs to incorporate all business rules maintained within the System.
Project Closeout Report	Create and Approve the Project Closeout Report.

F. Major Milestones

Major Milestone	Milestone Description
Identification and prioritization of business systems rules	Identify and prioritize business systems rules to documented within the Business Rules Catalog.
Creation of Business Rules Catalog	System rules will be reviewed and documented to develop a Business Rules Catalog.
Project Closeout Report	Develop and approve the Project Closeout Report.

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business

Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicholas Lent	Project Owner
Daniel Swaisgood	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. System documentation detailing current business rules are readily available and accessible.
2. Technical support and Subject Matter Expert resources will be available as needed, to support the project as needed.

Project Constraints

1. Limited time and capacity of individuals assigned to assist.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

	Rules Catalog	**196 days**	**Tue 8/1/23**	**Tue 4/30/24**	**58%**
✓	Rules Catalog Project Start	0 days	Tue 8/1/23	Tue 8/1/23	100%
✓	**Initiation**	**22 days**	**Wed 8/2/23**	**Fri 9/1/23**	**100%**
✓	**Planning**	**18 days**	**Tue 8/29/23**	**Thu 9/21/23**	**100%**
	Execution	**189 days**	**Tue 8/1/23**	**Fri 4/19/24**	**45%**
	Required Project Development	**185 days**	**Tue 8/1/23**	**Mon 4/15/24**	**45%**
	Create No Use Case Rules Catalogs	**185 days**	**Tue 8/1/23**	**Mon 4/15/24**	**45%**
	SME Review	**154 days**	**Tue 8/1/23**	**Fri 3/1/24**	**30%**
	Technical Change Control Committee Review	**150 days**	**Wed 8/2/23**	**Wed 2/28/24**	**70%**
	Approve RC Catalogs	**59 days**	**Wed 1/24/24**	**Mon 4/15/24**	**0%**
	Catalog Development Complete	0 days	Mon 4/15/24	Mon 4/15/24	0%
	Conduct Lessons Learned Meeting	**4 days**	**Tue 4/16/24**	**Fri 4/19/24**	**0%**
	Execution Phase complete	0 days	Fri 4/19/24	Fri 4/19/24	0%
	Monitoring and Controlling	**196 days**	**Tue 8/1/23**	**Tue 4/30/24**	**60%**
	Monitoring and Controlling Phase Complete	0 days	Tue 4/30/24	Tue 4/30/24	60%
	Project Closeout	**9 days**	**Tue 4/16/24**	**Fri 4/26/24**	**0%**
	Closeout Phase complete	0 days	Tue 4/30/24	Tue 4/30/24	0%

III. Resource Loaded Project Schedule

The resource loaded project schedule is available on SharePoint.

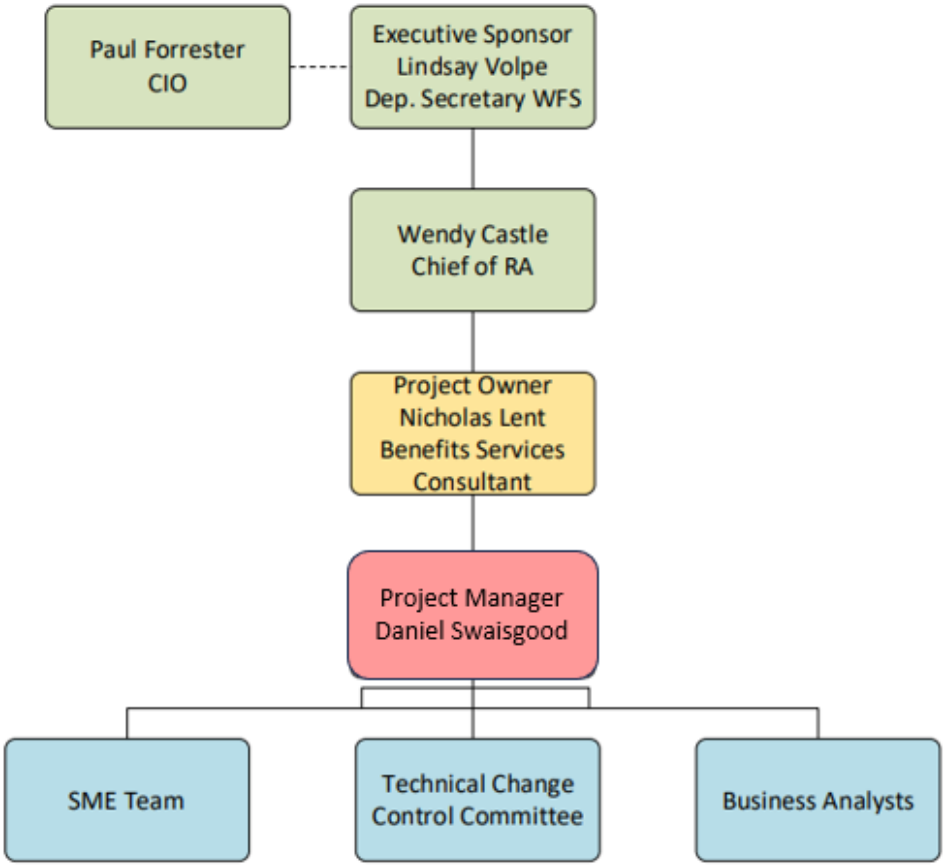
IV. Project Spending Plan

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: $0.00	*Software: $0.00*
Other OpEx: $0.00	*Other OpEx: $0.00*
Other CapEx: $0.00	*Other CapEx: 0.00*

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Domenic DiLullo	CTO	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicholas Lent	Project Owner/Benefits	• Contributes subject matter expertise

Name	Project Role	Responsibility
	Services Consultant	• Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables
Daniel Swaisgood	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Technical Team	Technical Support	• Contributes technical expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager is evaluating change requests
Vendor	Strategic Planning Office (SPO)	• Monitors project progress • Facilitates FloridaCommerce Leadership Team Governance meetings • Provides guidance and support to project manager and project team members

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan

- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for Continuous Modernization, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.

- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.

OPERATIONAL WORK PLAN
FOR
SYSTEM AND SOFTWARE INTEGRATOR

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON JANUARY 31, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 5
G. KEY STAKEHOLDERS 5
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 6
III. RESOURCE LOADED PROJECT SCHEDULE 6
IV. PROJECT SPENDING PLAN 10
V. PROJECT ORGANIZATION AND METHODOLOGY 10
A. PROJECT ORGANIZATIONAL CHART 10
B. PROJECT ROLES AND RESPONSIBILITIES 11
C. PROJECT MANAGEMENT METHODOLOGY 17
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 17
VII. PROJECT RISK MANAGEMENT PLAN 18
VIII. CAPACITY PLAN 18

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

A. Scope Statement

The Reemployment Assistance Claims and Benefits Information System's (System) current architecture is not modular. Lack of modularity requires extensive regression testing for all system enhancements and updates. The current System has a high level of technical debt. This technical debt increases the cost of maintenance as well as the risk of unintended effects elsewhere in the System. To assist in software transformation, Florida Commerce has procured the services of a System software integrator to provide analysis, oversight, monitoring, and testing, and to assume the responsibilities for the foundational technical platform and systems and software integration services necessary to develop and implement the System's current and future infrastructure for modernization. These integration efforts will allow Florida Commerce to secure services which can interoperate and communicate without relying on a common platform or technology. Connecting services, systems, and infrastructures and developing integration standards are the next steps for advancing the System's maturity and System modularity for modernization. This will ensure that an optimized cloud service and delivery model is utilized to deliver business process improvements, functional enhancements, a mobile-responsive application, and modernized architectural efficiencies.

Integration services include documenting the existing technical requirements and specifications of the System and an analysis of the existing technical requirements and specifications. The analysis will determine what technical requirements and specifications need to be improved to increase the effectiveness and efficiency of the System and assist FloridaCommerce with acquiring software and hardware solutions that support the Reemployment Assistance Modernization Program. This shall include full evaluation of the Reemployment Assistance Information Technology program that relates to the System.

In Scope

- A modern System that integrates the infrastructure, software, data, analytics, and security components of the RA Continuous Modernization program.

Out of Scope

- Software Development
- Individual testing at the project level within the Continuous Modernization projects
- Projects not specifically identified in C3272.
- Organizational Change Management

B. Project Objectives and Business Benefits

Project Objective	Business Benefit
Improved delivery of RA Benefits	

Improved functionality	Increased customer satisfaction and self-service alleviates dependencies on staffing
Improved system performance	System availability is improved Less regression testing Faster code delivery to production
A secure and scalable system with a sustainable system architecture	Reduction in capital expenditures

C. Critical Success Factors

The following factors are necessary for success.

- Improved customer experience/user experience (CX/UX).
- Implementation of a model that will serve Florida's Reemployment Assistance needs for many years.
- Preservation of continuity of Florida Commerce operations and minimization of demands on Florida Commerce staff.
- Implementation of an operations model that will serve the Reemployment Assistance program for the long term.
- Compliance with state and federal standards.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
July 1, 2023	Project Kick-Off Meeting
October 2, 2023	Design Documentation
September 15, 2023	Infrastructure Performance Requirements
December 28, 2023	Performance Benchmarks
June 30, 2024	Oversight and Monitoring of RA Projects
June 30, 2024	Integration Testing
June 30, 2024	Integration Services
June 30, 2024	Testing Team
June 30, 2024	Project Closure

E. Major Deliverables

Major Deliverable	Deliverable Description
Deliverable 7	Design Documentation
Deliverable 8	Infrastructure Performance Requirements
Deliverable 11	Performance Benchmarks
Deliverable 13	Oversight and Monitoring of RA Projects
Deliverable 14	Integration Testing
Deliverable 15	Integration Services (Production Readiness Checklist)
Deliverable 20	Testing Team

Major Deliverable	Deliverable Description
Deliverable 21	Information Security and Regulatory Compliance
Deliverable 22	Business Strategy Development

F. Major Milestones

The project cannot be completed without the milestones listed below. Transparency and inclusion in all major milestones and deliverables will help build and maintain an accurate schedule.

Major Milestone	Milestone Description
Initiation Phase Complete	All initiation activities completed
Planning Phase Complete	All planning activities completed
Execution Phase Complete	All execution activities completed
Monitor and Controlling Phase Complete	All monitoring and controlling activities completed
Closing Phase Complete	Project is completed

G. Key Stakeholders

The stakeholders listed below are critical in providing direction, especially with a project that will have a large amount of discovery. The project sponsors will be valuable when issues that require executive decisions are needed, and when there may be negotiations for keeping and purging older data based on its value.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicole Sanislow and Karmyn Hill	Project Owner
Monique Emmanuel	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. Vendor will create/recommend solutions that promote useability, product innovation, and scalability by using innovative concepts and that are suitable for a government environment with funding constraints.

Project Constraints

1. Design may be materially constrained by:

a. Governing provisions of federal or state laws and regulations.
b. Requirement to reduce operating costs.
c. A schedule constraint of June 2024

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	**Modernization Program**
1.1	Program start
1.2	Contract Amendment #4 - Approval
1.3	**Program Deliverables**
1.3.1	**Deliverable 7 - Design Documentation**
1.3.2	**Deliverable 8 - Infrastructure Performance Requirements**
1.3.3	**Deliverable 11 - Performance Benchmarks**
1.3.4	**Deliverable 13 – Oversight and Monitoring of Modernization Projects**
1.3.5	**Deliverable 14 - Integration Testing**
1.3.6	**Deliverable 15 - Production Readiness Checklist**
1.3.7	**Deliverable 20 - User Acceptance Testing**
1.3.8	**Deliverable 21 – Information Security and Regulatory Compliance**
1.3.9	**Deliverable 22 – Business Strategy Development**
1.5	**Program Delivery Complete**
1.6	**Project Close and Transition to Florida Commerce**
1.6.1	Mutually Agreed on Transition Date
1.6.2	**Execute Transition**
1.7	Program Closed

III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
1	**1**	**Initiation**	**86 days**	**Wed 7/5/23**	**Wed 11/1/23**			
2	**1.1**	**Risk and Complexity Assessment**	**1.94 days**	**Wed 7/5/23**	**Thu 7/6/23**			
3	1.1.1	Complete Pre-Charter Risk&Complexity Assessment and determine Project Level	0.94 days	Wed 7/5/23	Wed 7/5/23		4,6	
4	1.1.2	Complete Initiation Gate Risk&Complexity Assessn	0.94 days	Thu 7/6/23	Thu 7/6/23	3		
5	**1.2**	**Deliverable: Project Charter**	**85 days**	**Thu 7/6/23**	**Wed 11/1/23**			
6	1.2.1	Develop Project Charter	1 day	Thu 7/6/23	Thu 7/6/23	11,3	7	Monique Emmanuel
7	1.2.2	Review/Update Project Charter	1 day	Fri 7/7/23	Fri 7/7/23	6	8	
8	1.2.3	Approve Project Charter	23 days	Mon 10/2/23	Wed 11/1/23	7	9	
9	1.3	Project Charter complete	0 days	Wed 11/1/23	Wed 11/1/23	8		
10	**1.4**	**Stakeholders Register**	**1 day**	**Mon 10/2/23**	**Mon 10/2/23**			
11	1.4.1	Identify Project Stakeholders	1 day	Mon 10/2/23	Mon 10/2/23		6	Monique Emmanuel
12	1.4.2	Identify OCM Stakeholders	1 day	Mon 10/2/23	Mon 10/2/23			Monique Emmanuel
13	1.5	Initiation Phase complete	23 days	Mon 10/2/23	Wed 11/1/23		16	
14	**2**	**Planning**	**23.53 days**	**Mon 11/6/23**	**Thu 12/7/23**			
15	**2.1**	**Deliverable: Resource Plan**	**2.81 days**	**Mon 11/6/23**	**Wed 11/8/23**			
16	2.1.1	Develop Resource Plan	0.94 days	Mon 11/6/23	Mon 11/6/23	13	17	
17	2.1.2	Review/Update Resource Plan	0.94 days	Mon 11/6/23	Tue 11/7/23	16	18,21	
18	2.1.3	Approve Resource Plan	0.94 days	Tue 11/7/23	Wed 11/8/23	17	19	
19	2.2	Resource Plan Complete	0 days	Wed 11/8/23	Wed 11/8/23	18		Monique Emmanuel
20	**2.3**	**Deliverable: Project Schedule**	**4.27 days**	**Fri 11/17/23**	**Thu 11/23/23**			
21	2.3.1	Prepare Work Breakdown Structure	3 days	Fri 11/17/23	Tue 11/21/23	17	22	Monique Emmanuel
22	2.3.2	Develop Project Schedule	2 days	Fri 11/17/23	Mon 11/20/23	21	23	Monique Emmanuel
23	2.3.3	Review/Update Project Schedule	1.33 days	Tue 11/21/23	Wed 11/22/23	22	24	Monique Emmanuel

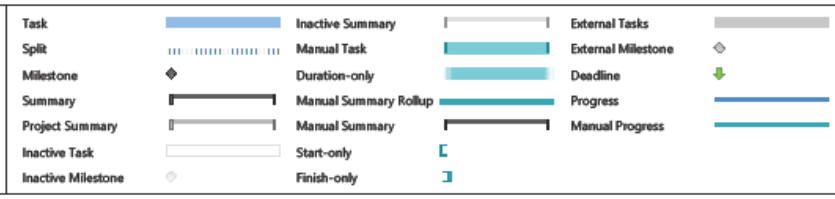
Project: System Integrator
Date: Tue 12/5/23

Task		Inactive Summary		External Tasks	
Split		Manual Task		External Milestone	
Milestone		Duration-only		Deadline	
Summary		Manual Summary Rollup		Progress	
Project Summary		Manual Summary		Manual Progress	
Inactive Task		Start-only			
Inactive Milestone		Finish-only			

Page 1

ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
24	2.3.4	Approve Project Schedule	0.94 days	Wed 11/22/2	Thu 11/23/2	23	25,27	
25	2.4	Project Schedule complete	0 days	Thu 11/23/2	Thu 11/23/2	24		
26	2.5	Deliverable: Project Management Plan	2.81 days	Wed 11/22/	Mon 11/27/			
27	2.5.1	Develop Project Management Plan	0.94 days	Wed 11/22/2	Thu 11/23/2	24	28	Monique Emmanuel
28	2.5.2	Review/Update Project Management Plan	0.94 days	Thu 11/23/2	Fri 11/24/23	27	29,32	
29	2.5.3	Approve Project Management Plan	0.94 days	Fri 11/24/23	Mon 11/27/2	28	30	
30	2.5.4	Project Management Plan complete	0 days	Mon 11/27/2	Mon 11/27/2	29		
31	2.6	Deliverable: Project Budget	4.25 days	Mon 11/27/	Mon 12/4/2			
32	2.6.1	Prepare Project Budget	0.94 days	Mon 11/27/2	Tue 11/28/2	28	33	Monique Emmanuel
33	2.6.2	Review/Update Project Budget	1.16 days	Tue 11/28/2	Wed 11/29/2	32	34	
34	2.6.3	Approve Project Budget	1.16 days	Wed 11/29/2	Fri 12/1/23	33	35,37	Monique Emmanuel
35	2.6.4	Project Budget complete	0 days	Mon 12/4/23	Mon 12/4/23	34		Monique Emmanuel
36	2.7	Deliverable: Project Spending Plan	3.47 days	Mon 12/4/2	Thu 12/7/23			
37	2.7.1	Prepare a Project Spending Plan	1.16 days	Mon 12/4/23	Tue 12/5/23	34	38	Monique Emmanuel
38	2.7.2	Review/Update Project Spending Plan	1.16 days	Tue 12/5/23	Wed 12/6/23	37	39	
39	2.7.3	Approve Project Spending Plan	1.16 days	Wed 12/6/23	Thu 12/7/23	38	40	
40	2.8	Project Spending Plan complete	0 days	Wed 12/6/23	Wed 12/6/23	39		Monique Emmanuel
41	2.9	Complete Impact Analysis	0.94 days	Mon 12/4/23	Mon 12/4/23			Monique Emmanuel
42	2.10	Complete the Planning Gate R&C Assessment	0.94 days	Mon 12/4/23	Mon 12/4/23			
43	3	Execution	373.94 days	Mon 1/2/23	Thu 6/6/24			
44	3.1	Modernization Program	373.94 days	Mon 1/2/23	Thu 6/6/24			
45	3.1.1	Program start	0.94 days	Mon 7/3/23	Mon 7/3/23			
46	3.1.2	Contract Amendment #4- Approval	16.88 days	Wed 11/1/23	Thu 11/23/2			

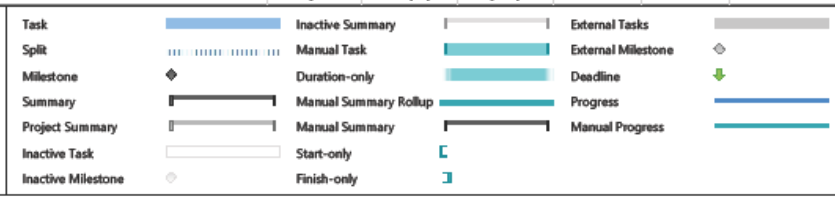
Project: System Integrator
Date: Tue 12/5/23



Page 2

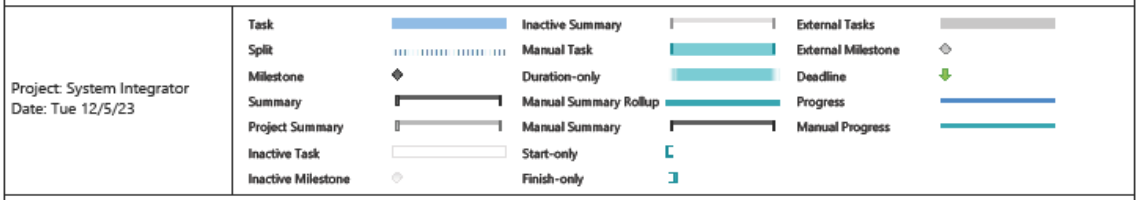
ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
47	**3.1.3**	**Program Deliverables**	**368 days**	**Mon 1/2/23**	**Wed 5/29/24**			
190	3.1.4	Program Delivery Complete	0 days	Wed 5/1/24	Wed 5/1/24			
191	**3.1.5**	**Project Close and Transition to DEO**	**59.94 days**	**Fri 3/15/24**	**Thu 6/6/24**			
219	3.2	Prepare Operations and Maintenance Plan (only required for Level 2-4 projects)	0.94 days	Mon 5/6/24	Mon 5/6/24			
220	**4**	**Monitoring and Controlling**	**272.33 days**	**Wed 7/5/23**	**Fri 7/19/24**			
221	4.1	Manage Project Schedule	224.69 days	Mon 7/24/23	Fri 5/31/24			Monique Emmanuel
222	4.2	Manage Project Costs	171.75 days	Mon 7/31/23	Tue 3/26/24			Monique Emmanuel
223	4.3	Manage Project Scope	224.69 days	Mon 7/24/23	Fri 5/31/24			Monique Emmanuel
224	4.4	Manage Project Risks	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
225	4.5	Manage Project Issues	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
226	4.6	Manage Decisions	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
227	4.7	Manage Action Items	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
228	4.8	Manage Cybersecurity	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
229	4.9	Update RTM	53.33 days	Mon 5/6/24	Fri 7/19/24			Monique Emmanuel
230	4.10	Record Lessons Learned	13.33 days	Mon 5/6/24	Fri 5/24/24			Monique Emmanuel
231	4.11	Prepare Regularly scheduled Status Reports	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
232	4.12	Conduct Regularly scheduled Status Meetings	254 days	Wed 7/5/23	Mon 6/24/24			Monique Emmanuel
233	**4.13**	**Conduct Lessons Learned Meeting**	**11.33 days**	**Mon 6/10/24**	**Tue 6/25/24**			
234	4.13.1	Schedule Lessons Learned meeting	1.33 days	Mon 6/10/24	Tue 6/11/24			Monique Emmanuel
235	4.13.2	Conduct Lessons Learned meeting	1.33 days	Mon 6/24/24	Tue 6/25/24			Monique Emmanuel
236	4.13.3	Record Lessons Learned	1.33 days	Mon 6/24/24	Tue 6/25/24			Monique Emmanuel
237	4.14	Monitoring and Controlling Phase Complete	0 days	Mon 6/24/24	Mon 6/24/24		239	
238	**5**	**Project Closeout**	**20 days**	**Mon 6/3/24**	**Fri 6/28/24**			

Project: System Integrator
Date: Tue 12/5/23



Page 3

ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
239	5.1	Schedule Project Closeout Meeting	1.33 days	Mon 6/3/24	Tue 6/4/24	237	241	Monique Emmanuel
240	5.2	Deliverable: Project Closeout Report	2.94 days	Tue 6/25/24	Thu 6/27/24			
241	5.2.1	Develop Project Closeout Report	1.33 days	Tue 6/25/24	Wed 6/26/24	239	242	Monique Emmanuel
242	5.2.2	Review/Update Project Closeout Report	0.94 days	Wed 6/26/24	Wed 6/26/24	241	243	
243	5.2.3	Approve Project Closeout Report	0.94 days	Thu 6/27/24	Thu 6/27/24	242	245	
244	5.3	Project Closeout Report complete	0 days	Fri 6/21/24	Fri 6/21/24			Monique Emmanuel
245	5.4	Conduct Knowledge Transfer	14.06 days	Mon 6/3/24	Fri 6/21/24	243	246	
246	5.5	Conduct Project Closeout meeting	1.33 days	Mon 6/24/24	Tue 6/25/24	245	248	Monique Emmanuel
247	5.6	Conduct Lessons Learned Meeting	18.33 days	Mon 6/3/24	Thu 6/27/24			
248	5.6.1	Schedule Lessons Learned meeting	1.33 days	Mon 6/3/24	Tue 6/4/24	246	249	Monique Emmanuel
249	5.6.2	Conduct Lessons Learned meeting	1.33 days	Wed 6/26/24	Thu 6/27/24	248	250	Monique Emmanuel
250	5.6.3	Record Lessons Learned	1.33 days	Tue 6/25/24	Wed 6/26/24	249	251	Monique Emmanuel
251	5.7	Closeout Phase complete	0 days	Fri 6/28/24	Fri 6/28/24	250		



Page 4

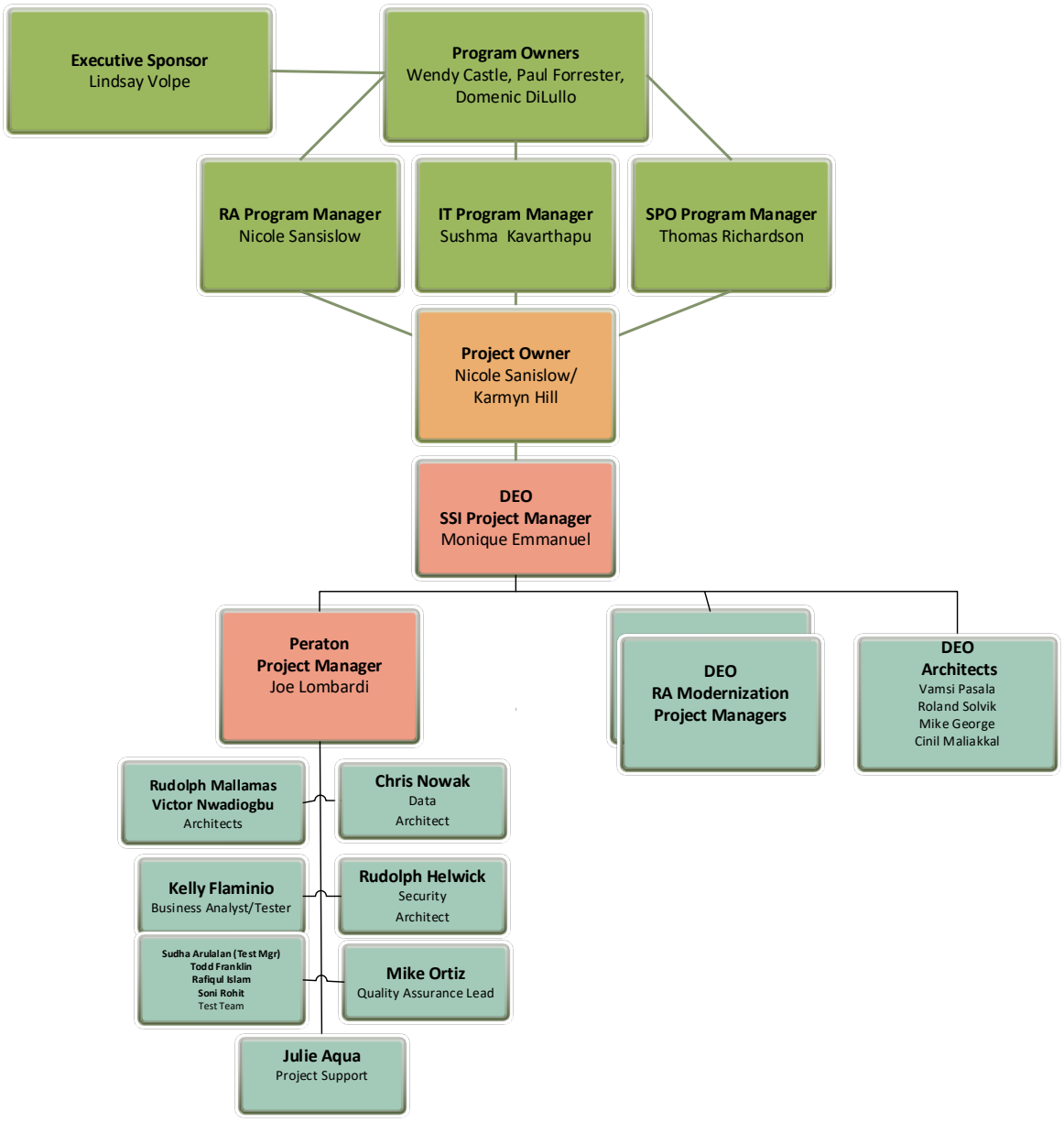
IV. Project Spending Plan

FY 2021-22 Expenditures	FY 2022-23 Expenditures	FY 2023-24 Expenditures
Software: $0	*Software: $0*	*Software: $0*
Other CapEx: $33,737.60	*Other CapEx: $1,748,687.40*	*Other CapEx: $5,390,630.33*

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester Wendy Castle Domenic DiLullo	Program Owners	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicole Sanislow Sushma Kavarthapu Thomas Richardson	Program Managers	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project
Nicole Sanislow Karmyn Hill	Project Owner	• Represents the interests of the stakeholders • Monitors project progress • Approves project definition • Approves plans and schedules • Validates project deliverables meet expectations • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
Monique Emmanuel	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
Vamsi Pasala	FloridaCommerce Enterprise Architects	• Contribute subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule

Name	Project Role	Responsibility
Roland Solvik Mike George Cinil Maliak		• Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this PMP • Assist the Project Manager in responding to risks and issues • Assist the Project Manager in evaluating change requests
Joe Lombardi	SSI Delivery Team Lead	• Responsible for managing System integration and modernization program operations. • Develops the program strategy, supporting business case and various enterprise-wide high-level project plans. • Ensures integration of projects and adjusts project scope, timing, and budgets as needed, based on the needs of the Department. • Communicates with Peraton and Department leadership, business leadership and IT Business Consultants to communicate program strategy, direction, and changes. • Responsible for delivering all projects contained in the System modernization portfolio of projects on time, within budget and meeting the strategic and business requirements of the Department. • Responsible for tracking key program milestones and implementing adjustments to achieve Department objectives. • Partners with Departmental senior leadership to identify and prioritize opportunities for using IT to achieve the goals of the enterprise. • Develops and maintains the program management plans and schedule. • Serves as the single point of accountability for contract delivery and execution and Peraton staff.
Rudolph Mallamas Victor Nwadiogbu	Solutions Architects	• Responsible for providing senior level expertise on decision recommendations and priorities regarding the Department's overall modernization initiative's architecture. • Facilitates the establishment and implementation of standards and guidelines

Name	Project Role	Responsibility
		that guide the design of technology solutions including architecting and implementing solutions requiring integration of multiple platforms, operating systems, and applications across the program. • Reviews, advises, and designs standard software and hardware builds, system options, risks, costs vs. benefits and impact on the Department's business process and goals. • Develops and documents the framework for integration and implementation for changes to technical standards. • Assists in the development of and manages an architecture governance process. Provides technical guidance to project team areas as appropriate. • Contributes to the development of requirements for the Department's statements of work, reviews and evaluates vendor technical proposals, participates in source selection. • Tracks industry trends and maintains knowledge of new technologies to better serve the Department's architecture needs.
Chris Nowak	Data Architect	• Responsible for program-wide data design, balancing optimization of data access with batch loading and resource utilization factors. • Designs and oversees the construction of data architectures, operational data stores, and data marts. • Focuses on program-wide data modeling and database design. • Provides significant input in the design of program data architecture standards, policies and procedures for the modernization program, structure, attributes, and nomenclature of data elements, and applies accepted data content standards to technology projects. • Contributes to business analysis, data acquisition and access analysis and design, Database Management Systems optimization, recovery strategy, and load strategy design and

Name	Project Role	Responsibility
		implementation.
Kelly Flaminio	Business Analyst and Tester	• Performs as the subject matter expert in unemployment compensation/insurance for the team. • Works closely with the Department, business analysts, and team members to understand business requirements that drive the analysis and design of quality technical solutions. • Involved in the full program life cycle and is responsible for designing, testing, implementing, maintaining, and supporting applications software that is delivered on time and within budget. • Participates in component and data architecture design, performance monitoring, product evaluation and buy vs. build recommendations. • Contributes to program procurement activities to include statement of work requirements, proposal evaluation, and source selection. • Performs systems analysis and design. • Applies understanding of development, quality assurance and integration methodologies in overseeing the technical implementation of program requirements.
Mike Ortiz	Transition and Quality Manager	• Leads the program transition activities for Peraton, planning and coordinating the transition on to and off of the Department. • Responsible for establishing and implementing Peraton's quality assurance and compliance processes for the Department. • Works closely with Department and vendor project IT leaders to develop and implement an overall quality maturity roadmap and plan for each project. • Reviews progress toward the plan regularly with program IT and vendor leaders, technical teams to make modifications as necessary. • Establishes program IT service quality control standards, policies, and procedures. Monitors, evaluates, manages, and executes audit processes to ensure compliance.

Name	Project Role	Responsibility
		• Provides guidance and subject matter expertise to IT teams on QA methodologies and processes, educates them on their responsibilities/accountabilities for the purpose of achieving on-time and quality deliverables. • Makes recommendations and directs improvements to the software development lifecycle process. • Documents non-compliance to policies, process and standards and assists in their resolution.
Rudolph Helwick	Security Architect	• Manages the development and delivery of security standards, best practices, architecture, and systems to ensure information system security across the program. • Implements processes and methods for auditing and addressing non-compliance to information security standards; facilitates migration of non-compliant environments to compliant environments. • Ensures compliance with standards and currency with State and Federal security requirements. • Manages and participates in the planning and implementation of security administration for all program projects. • Contributes to the evaluation and selection of security applications and systems. • Makes recommendations and assists in the implementation of changes to work methods and procedures to make them more effective or to strengthen security measures.
Sudha Arulalan Jonathan T. Franklin Rafiqul Islam Soni Rohit	Program Integration Testers	• Prepares and plans for program integration testing. • Coordinates with project teams and communicates integration testing standards and requirements to them. • Documents program level integration test plans and scripts. • Conducts program level integration tests, identifies, and communicates test results to

Name	Project Role	Responsibility
		project teams, and conducts program level regression testing.
Julia Aqua	Project Support	• Assist SSI Delivery Team Lead with meeting agendas and minutes. • Provide project schedule updates.

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of Florida Commerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.

- Project Prioritization: Via a weighted scoring model used for RA Mod, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.

OPERATIONAL WORK PLAN
FOR
COMMUNICATIONS

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON FEBRUARY 5, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 4
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 5
E. MAJOR DELIVERABLES 5
F. MAJOR MILESTONES 5
G. KEY STAKEHOLDERS 5
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 6
II. WORK BREAKDOWN STRUCTURE 6
III. RESOURCE LOADED PROJECT SCHEDULE 7
IV. PROJECT SPENDING PLAN 7
V. PROJECT ORGANIZATION AND METHODOLOGY 8
A. PROJECT ORGANIZATIONAL CHART 8
B. PROJECT ROLES AND RESPONSIBILITIES 8
C. PROJECT MANAGEMENT METHODOLOGY 10
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 11
VII. PROJECT RISK MANAGEMENT PLAN 11
VIII. CAPACITY PLAN 12

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Comms project will provide usability improvements to the Reemployment Assistance Claims and Benefits Information System (Reconnect). Due to the very public nature of the Reconnect system and the difficulties it experienced during the COVID-19 pandemic, Comms is a very high-visibility project that, when completed, will be of great benefit to Floridians and a significant "win" for FloridaCommerce. The Comms project will help FloridaCommerce achieve the following goals:

1. Streamlined claimant workflow.
2. Simplified UI text, guides, forms, and other information.
3. New branding materials, including PR materials and a new outreach campaign.

A. Scope Statement

In Scope

- All appropriated, budgeted, and approved tasks necessary to implement the Comms solution.
- Subsequent transition to Application maintenance & Support.
- Specifics:
    - Plain Language simplification through the point of approval by FloridaCommerce Subject Matter Experts (SMEs).
        - Plain Language Batch 6.
        - Plain Language Batch 7.
        - The rationales spreadsheet, which was originally part of Batch 3, but was substantial enough that we could not finish it by 6/30/2023. After Change Request 18, it was moved to the Continuous Modernization Program (Cont. Mod.) on 7/6/2023 and was completed through the point of SME approval.
        - Plain Language of the existing Reconnect software. This is described in contract amendment #2 as Deliverable 8, Plain Language for Existing System and is characterized as Plain Language Batches 8-11. It includes UI text that was not simplified through the Plain Language process in Batches 1-7, however, the bulk of the work is not new Plain Language transformation, but instead reformatting the existing Plain Language files into a new format that will make integration into Reconnect easier.
        - Data mapping. This is described in contract amendment #2 as Deliverable 7. It is meant to create a data map between Reconnect and the CX/UX software. As of this OWP, details are meager because the CX/UX project moved to a new vendor and new CX/UX software. Deliverable 7 remains valid, and further details on its execution are expected in January 2024.
    - Integration of the entire scope of Plain Language files (batches 1-11) into

the new CX/UX software. Within Continuous Mod:
    - Phase POST-1a = Batches 1-4.
    - Phase 1b = Batch 5.
    - Phase 1c = Batch 6 and 7 and, presumably, Batches 8-11.
    - Pega Systems is responsible for the Plain Language integration. Peraton is responsible for testing the result.
    - NOTE: this integration will happen after the January 2024 release of the Pega software.
- Review, Approval, and Translation of the integrated CX/UX software.
    - FloridaCommerce subject matter experts (SMEs), the Office of General Counsel (OGC), and the Office of Communications and External Affairs (OCEA) combine to approve the final Plain Language.
    - The approved English is translated from English to Spanish and Haitian Creole. Pega implements the Spanish and Haitian Creole versions, and a final review and approval step completes the project.
    - Integration of the entire scope of Plain Language files (batches 1-11) into the Reconnect software, with a similar process for review, approval, and translation.

NOTE: all of these in-scope tasks and deliverables are repeated with each of the deployment cycles in the CX/UX project and Reconnect deployment.

Out of Scope

- Any work that is not specifically listed as "in scope."
- Any work that is not appropriated, budgeted, and approved.
- Any work that is already addressed by the Incremental CX/UX Comms project, which ended with RA Modernization on June 30, 2023.

B. Project Objectives and Business Benefits

Project Objective	Business Benefit
An agile and incremental approach will ensure the current UI information is simplified through the plain language process and integrated into the Reconnect system and the CX/UX system.	• Streamlined claimant workflow. • Simplified UI text, guides, forms, and other information. • Improved Reemployment Assistance service to Florida Citizens.

C. Critical Success Factors

- The information from the original Connect system will be simplified through a plain-language process that involves two vendors (Beacon and KPMG) and varied teams of SMEs from FloridaCommerce. This collaboration must be managed closely to achieve the highest-quality output and to meet scheduled deadlines.
- The output of the plain language process will be delivered to not just FloridaCommerce IT for integration into Reconnect, but to a third vendor: Pega

Systems, which is providing the commercial off-the-shelf (COTS) software solution that, with customizations, will provide a new mobile-responsive user interface for the CX/UX project. Pega must integrate the simplified information into the CX/UX software. This integration must achieve the highest-quality results and meet scheduled deadlines. Because Pega's mobile-responsive user interface is part of the CX/UX project – not part of the Comms project – this is an interdependency that must be managed very closely.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
June 2024	Project end.

E. Major Deliverables

Major Deliverable	Deliverable Description
Deliverable 1	Project Kick-off Meeting
Deliverable 2	Project Management Plan and Transition Plan
Deliverable 3	Project Schedule
Deliverable 4	Content Design Sessions
Deliverable 5	System Brand Manual
Deliverable 6	Plain Language Development and Translation
Deliverable 7	Data Mapping
Deliverable 8	Plain Language for Existing System

F. Major Milestones

Major Milestone	Milestone Description
Procurement Phase Complete	Complete
Initiation Phase Complete	Complete
Planning Phase Complete	Complete
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business

Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Jamie Dattoli	Project Owner
Daniel Swaisgood	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. FloridaCommerce, Beacon, and KPMG will provide resources capable of completing the required simplification tasks at the highest quality. Those resources must be dedicated to the tasks at a level that enables them to complete those tasks at the scheduled deadlines.
2. FloridaCommerce, Pega, and test vendor Peraton will provide resources capable of completing the required integration and testing tasks at the highest quality. Those resources must be dedicated to the tasks at a level that enables them to complete those tasks at the scheduled deadlines.

Project Constraints

1. End date of June 30, 2024 cannot be moved.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

	1	**Comms Project**	**249 days**	**64%**	**Wed 7/5/23**	**Fri 6/28/24**
✓	1.1	Comms Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
✓	**1.2**	**Initiation**	**98.1 days**	**100%**	**Wed 7/5/23**	**Mon 11/27/23**
✓	1.2.1	Initiation Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
✓	**1.2.2**	**Risk and Complexity Assessment**	**62 days**	**100%**	**Wed 7/5/23**	**Fri 9/29/23**
✓	**1.2.3**	**Stakeholders Register**	**5 days**	**100%**	**Fri 9/22/23**	**Fri 9/29/23**
✓	**1.2.4**	**Project Charter**	**33 days**	**100%**	**Thu 9/28/23**	**Wed 11/15/23**
✓	**1.2.5**	**Business Case**	**29 days**	**100%**	**Fri 10/6/23**	**Fri 11/17/23**
✓	**1.2.6**	**Project Kickoff Meeting**	**2 days**	**100%**	**Fri 9/29/23**	**Tue 10/3/23**
✓	**1.2.7**	**Conduct Lessons Learned Meeting**	**2.1 days**	**100%**	**Fri 11/17/23**	**Mon 11/27/23**
✓	1.2.8	Initiation Finish	0 days	100%	Mon 11/27/23	Mon 11/27/23
✓	**1.3**	**Planning**	**136 days**	**100%**	**Wed 7/5/23**	**Tue 1/23/24**
✓	1.3.1	Planning Start	0 days	100%	Fri 11/17/23	Fri 11/17/23
✓	**1.3.2**	**Deliverable: Human Resource Plan**	**11 days**	**100%**	**Fri 9/29/23**	**Mon 10/16/23**
✓	**1.3.3**	**Deliverable: Communication Plan**	**11 days**	**100%**	**Fri 9/29/23**	**Mon 10/16/23**
✓	**1.3.4**	**Deliverable: Project Schedule - First Full Draft + Baseline**	**134 days**	**100%**	**Wed 7/5/23**	**Fri 1/19/24**
✓	**1.3.5**	**Deliverable: Project Management Plan**	**55 days**	**100%**	**Wed 7/5/23**	**Wed 9/20/23**
✓	**1.3.6**	**Deliverable: Project Budget**	**11 days**	**100%**	**Fri 9/1/23**	**Tue 9/19/23**
✓	**1.3.7**	**Deliverable: Project Spending Plan**	**11 days**	**100%**	**Fri 9/1/23**	**Tue 9/19/23**
✓	**1.3.8**	**Risk and Complexity Assessment**	**1 day**	**100%**	**Fri 11/17/23**	**Mon 11/20/23**
✓	1.3.9	Planning Finish	0 days	100%	Mon 11/20/23	Mon 11/20/23
	1.4	**Execution**	**249 days**	**52%**	**Wed 7/5/23**	**Fri 6/28/24**
	1.4.1	**Continuous Mod: Phase POST-1a**	**184 days**	**46%**	**Wed 7/5/23**	**Sun 3/31/24**
	1.4.2	**Continuous Mod: Phase 1b Start**	**249 days**	**38%**	**Wed 7/5/23**	**Fri 6/28/24**
	1.4.3	**Continuous Mod: Phase 1c Start**	**159 days**	**89%**	**Wed 7/5/23**	**Fri 2/23/24**
	1.4.4	Execution Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24
	1.5	**Monitoring & Controlling**	**249 days**	**58%**	**Wed 7/5/23**	**Fri 6/28/24**
✓	1.5.1	Monitoring & Controlling Start	0 days	100%	Wed 7/5/23	Wed 7/5/23
	1.5.2	**Weekly Status Report**	**249 days**	**57%**	**Wed 7/5/23**	**Fri 6/28/24**
	1.5.3	**Monthly Status Report (OWP)**	**228.5 days**	**54%**	**Fri 7/28/23**	**Tue 6/25/24**
	1.5.4	**Status Meetings**	**181 days**	**99%**	**Wed 7/5/23**	**Wed 3/27/24**
	1.5.5	Monitoring & Controlling Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24
	1.6	**Closeout**	**5 days**	**0%**	**Mon 6/24/24**	**Fri 6/28/24**
	1.7	Comms Finish	0 days	0%	Fri 6/28/24	Fri 6/28/24

III. Resource Loaded Project Schedule

The resource-loaded project schedule is available on SharePoint.

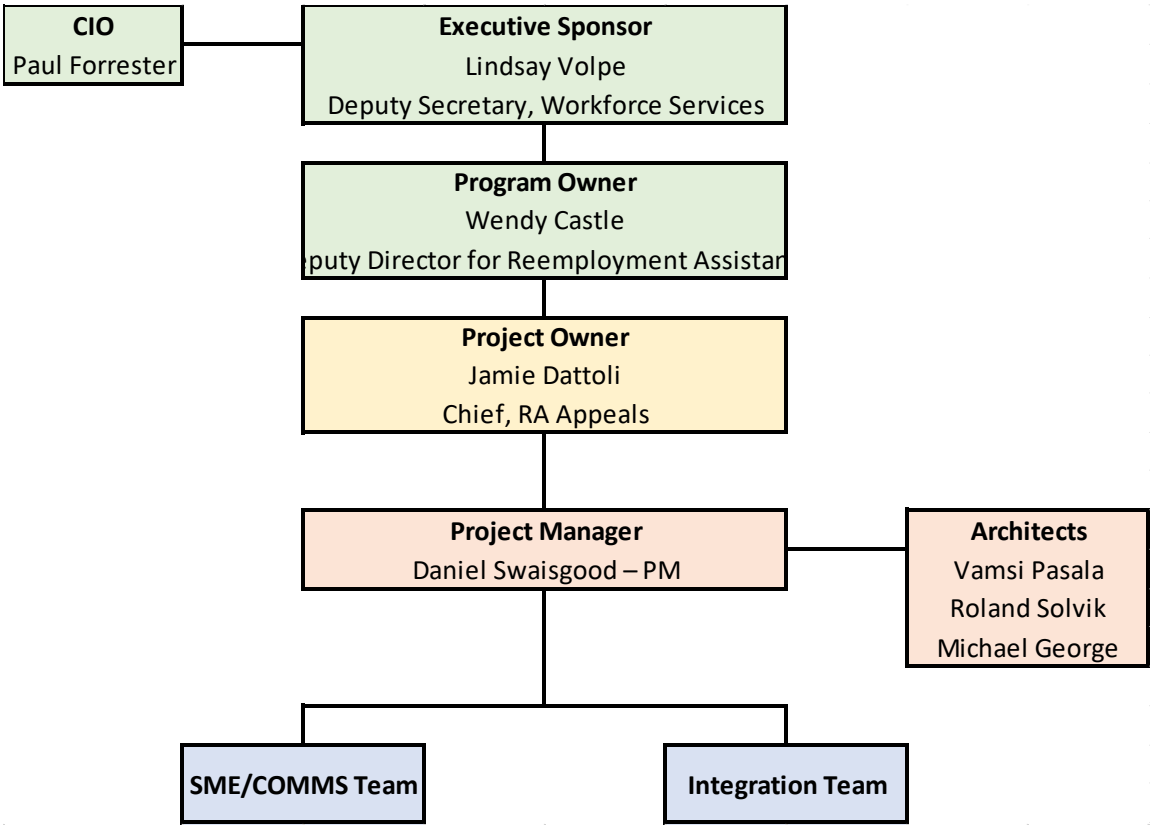
IV. Project Spending Plan

Budget and corresponding cost plans will be revised once the difference between Technology Tool Vendors is known.

FY 2023-24 Expenditures
Software: $0.00
Other OpEx:$986,540.28
Other CapEx: $0.00

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project

Name	Project Role	Responsibility
		• Reviewing and signing off on key milestones
Domenic DiLullo	CTO	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicole Sanislow and Karmyn Hill	Project Owner	• Contributes subject matter expertise • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables
Daniel Swaisgood	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise

Name	Project Role	Responsibility
		• Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Vendor	Strategic Planning Office (SPO)	• Monitors project progress • Facilitates FloridaCommerce Leadership Team Governance meetings • Provides guidance and support to project manager and project team members

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements

- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for Continuous Modernization, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.

OPERATIONAL WORK PLAN
FOR
CUSTOMER EXPERIENCE / USER EXPERIENCE (CX/UX)

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3
PREPARED ON JANUARY 31, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 4
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 4
G. KEY STAKEHOLDERS 5
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 6
III. RESOURCE LOADED PROJECT SCHEDULE 6
IV. PROJECT SPENDING PLAN 7
V. PROJECT ORGANIZATION AND METHODOLOGY 7
A. PROJECT ORGANIZATIONAL CHART 7
B. PROJECT ROLES AND RESPONSIBILITIES 7
C. PROJECT MANAGEMENT METHODOLOGY 9
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 10
VII. PROJECT RISK MANAGEMENT PLAN 11
VIII. CAPACITY PLAN 11

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Incremental Customer Experience/User Experience (CX/UX) Mobile-Responsive Transformation project will provide a mobile-responsive user interface for employers and Reemployment Assistance claimants across all external-facing screens. The CX/UX project will help the Department achieve the following goals:

1. Improve access and equity in the delivery of Reemployment Assistance benefits.
2. Improve information flow with claimants, employers, and TPAs to make quicker decisions.
3. Leverage new technologies to improve claimants, employers, and TPAs' overall experience with the Reemployment Assistance program, including reducing the amount of time it takes to file a claim for benefits.
4. Enhance System usability including accessibility.
5. Reduce maintenance and support time and costs.

A. Scope Statement

In October 2023, FloridaCommerce terminated its contract with its Technology Tool Vendor and amended an existing agreement with one of its current vendors to modify and enhance an existing initial claims application (mobile-responsive user interface). The existing mobile-responsive user interface was originally created in 2020 to help support the influx of claims received as a result of the economic downturn. The scope of this project is to add missing claimant questions to the existing mobile-responsive user interface, and to address errors that exist when transmitting (ingestion) the data to Reconnect. Furthermore, the project will introduce dynamic fact-finding questionnaires.

In Scope

- Addressing known data ingestion errors.
- Implementing dynamic fact-finding questionnaires associated with the initial claims application. These have been prioritized based on how often they populate in Reconnect today.
- Adding initial claims application questions from Reconnect to complete the application flow in the new mobile-responsive user interface. These questions in the previously plain language will be added in Reconnect.

Out of Scope

- Application of full plain language to the existing initial claims application.
- Reconnect code changes.
- API development.

B. Project Objectives and Business Benefits

Project Objective	Business Benefit
An agile and incremental approach will be utilized to ensure that business process optimization (BPO) is incorporated into the transformation activities for the CX/UX project.	• Increased System up-time. • The time to file an Initial Claim for Reemployment Assistance benefits will be reduced. • A mobile-responsive user interface is installed, configured, and tested. • Improved stability, reliability, and maintainability of the System. • Improved Reemployment Assistance service to Floridians. • Predictable maintenance cost for the application.

C. Critical Success Factors

The following factors are necessary for success.

- Resolve known data ingestion issues.
- Add missing claimant questions.
- Add of fact-finding questionnaires.
- Availability of key business, technology, and vendor resources.
- Access to user-friendly mobile responsive claim intake application.

D. Key Dates

The key dates below represent the current status of the project as well as planned dates for the project.

Key Date	Importance and Relevance to the Project
January 2024	Implement the new mobile-responsive user interface.

E. Major Deliverables

Major Deliverable	Deliverable Description
By January 2024	Implement the new mobile-responsive user interface. Vendor will design, develop, and implement the solution which meets the Department's requirements and constraints.

F. Major Milestones

Major Milestone	Milestone Description
Procurement Phase Complete	Complete
Initiation Phase Complete	Complete
Planning Phase Complete	Complete
Execution Phase Complete	In progress

Major Milestone	Milestone Description
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicole Sanislow and Karmyn Hill	Project Owner
Jim Sparks	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. Vendor and FloridaCommerce can address ingestion errors in transmission from the mobile-responsive user interface to FloridaCommerce.
2. No real-time interface from the mobile-responsive user interface to Reconnect for a claimant application.
3. Vendor will provide post go-live support of its front-end intake screens.
4. Current language does not need to be reviewed and is acceptable as-is.

Project Constraints

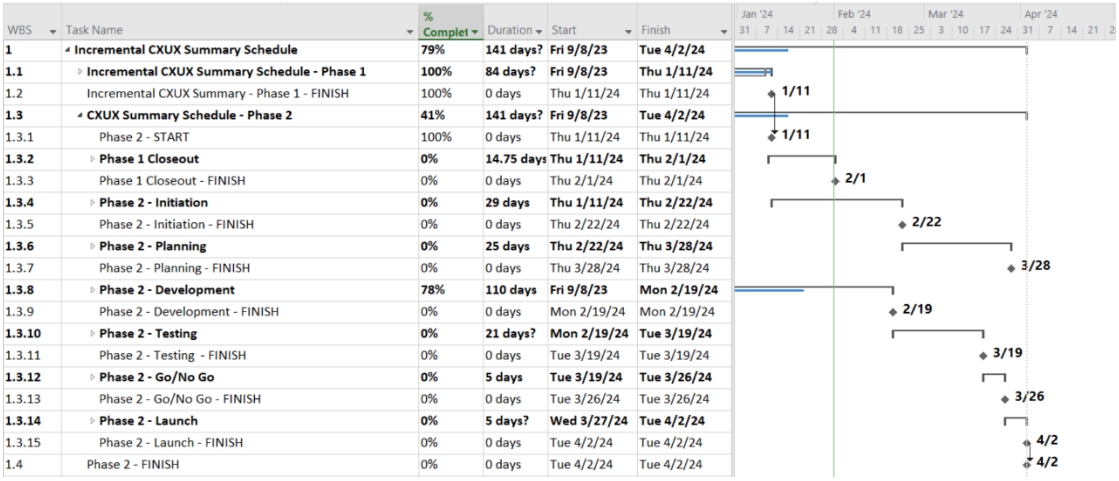
1. The CX/UX project end date of January 9, 2024, cannot be moved.
2. Timeframe limits the implementation to the first 28 fact-finding applications prioritized by the Reemployment Assistance program.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	**Incremental CXUX Summary Schedule**
1.1	**Incremental CXUX Summary Schedule - Phase 1**
1.2	Incremental CXUX Summary - Phase 1 - FINISH
1.3	**CXUX Summary Schedule - Phase 2**
1.3.1	Phase 2 - START
1.3.2	**Phase 1 Closeout**
1.3.3	Phase 1 Closeout - FINISH
1.3.4	**Phase 2 - Initiation**
1.3.5	Phase 2 - Initiation - FINISH
1.3.6	**Phase 2 - Planning**
1.3.7	Phase 2 - Planning - FINISH
1.3.8	**Phase 2 - Development**
1.3.9	Phase 2 - Development - FINISH
1.3.10	**Phase 2 - Testing**
1.3.11	Phase 2 - Testing - FINISH
1.3.12	**Phase 2 - Go/No Go**
1.3.13	Phase 2 - Go/No Go - FINISH
1.3.14	**Phase 2 - Launch**
1.3.15	Phase 2 - Launch - FINISH
1.4	Phase 2 - FINISH

III. Resource Loaded Project Schedule



WBS	Task Name	% Complet	Duration	Start	Finish
1	**Incremental CXUX Summary Schedule**	**79%**	**141 days?**	**Fri 9/8/23**	**Tue 4/2/24**
1.1	**Incremental CXUX Summary Schedule - Phase 1**	**100%**	**84 days?**	**Fri 9/8/23**	**Thu 1/11/24**
1.2	Incremental CXUX Summary - Phase 1 - FINISH	100%	0 days	Thu 1/11/24	Thu 1/11/24
1.3	**CXUX Summary Schedule - Phase 2**	**41%**	**141 days?**	**Fri 9/8/23**	**Tue 4/2/24**
1.3.1	Phase 2 - START	100%	0 days	Thu 1/11/24	Thu 1/11/24
1.3.2	**Phase 1 Closeout**	**0%**	**14.75 days**	**Thu 1/11/24**	**Thu 2/1/24**
1.3.3	Phase 1 Closeout - FINISH	0%	0 days	Thu 2/1/24	Thu 2/1/24
1.3.4	**Phase 2 - Initiation**	**0%**	**29 days**	**Thu 1/11/24**	**Thu 2/22/24**
1.3.5	Phase 2 - Initiation - FINISH	0%	0 days	Thu 2/22/24	Thu 2/22/24
1.3.6	**Phase 2 - Planning**	**0%**	**25 days**	**Thu 2/22/24**	**Thu 3/28/24**
1.3.7	Phase 2 - Planning - FINISH	0%	0 days	Thu 3/28/24	Thu 3/28/24
1.3.8	**Phase 2 - Development**	**78%**	**110 days**	**Fri 9/8/23**	**Mon 2/19/24**
1.3.9	Phase 2 - Development - FINISH	0%	0 days	Mon 2/19/24	Mon 2/19/24
1.3.10	**Phase 2 - Testing**	**0%**	**21 days?**	**Mon 2/19/24**	**Tue 3/19/24**
1.3.11	Phase 2 - Testing - FINISH	0%	0 days	Tue 3/19/24	Tue 3/19/24
1.3.12	**Phase 2 - Go/No Go**	**0%**	**5 days**	**Tue 3/19/24**	**Tue 3/26/24**
1.3.13	Phase 2 - Go/No Go - FINISH	0%	0 days	Tue 3/26/24	Tue 3/26/24
1.3.14	**Phase 2 - Launch**	**0%**	**5 days?**	**Wed 3/27/24**	**Tue 4/2/24**
1.3.15	Phase 2 - Launch - FINISH	0%	0 days	Tue 4/2/24	Tue 4/2/24
1.4	Phase 2 - FINISH	0%	0 days	Tue 4/2/24	Tue 4/2/24

The WBS shown above indicates a second phase with an initial forecast for completion in April 2024. Planning is expected to start soon to detail out the scope of this new phase.

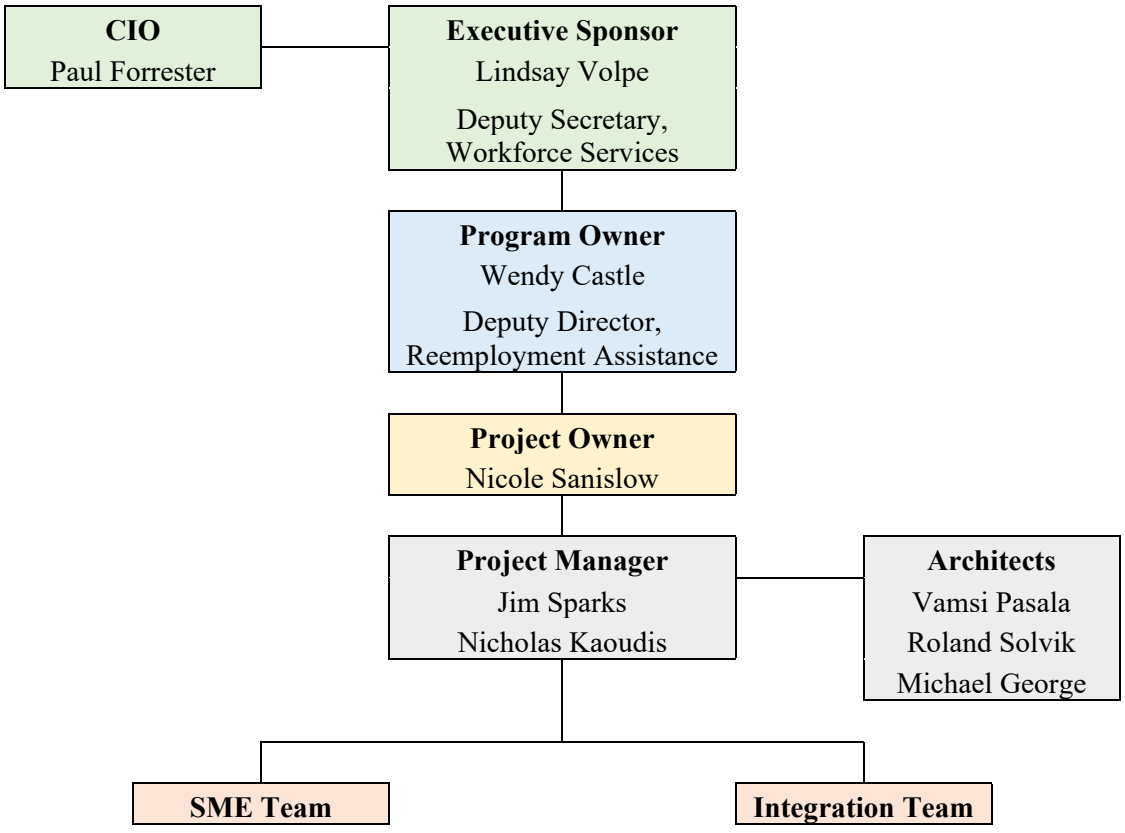
IV. Project Spending Plan

Budget and corresponding cost plans will be revised once the difference between Technology Tool Vendors is known.

FY 2023-24 Expenditures
Software: $0.00
Other OpEx:$8,990,430.83
Other CapEx: $0.00

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Domenic DiLullo	CTO	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicole Sanislow and Karmyn Hill	Project Owner	• Contributes subject matter expertise • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies

Name	Project Role	Responsibility
		• Reviews and approves deliverables
Jim Sparks	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Technical Team	Technical Support	• Contributes technical expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager is evaluating change requests
Vendor	Strategic Planning Office (SPO)	• Monitors project progress • Facilitates FloridaCommerce Leadership Team Governance meetings • Provides guidance and support to project manager and project team members

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must

include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Project Prioritization: Via a weighted scoring model used for Continuous Modernization, projects within the program have been prioritized for the purpose of optimizing resources and time.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as union strikes, weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Not enough Capacity: Understand that obtaining new needed resources takes time and advance planning is imperative.

OPERATIONAL WORK PLAN
FOR
REPORTS

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON JANUARY 31, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 4
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 4
E. MAJOR DELIVERABLES 11
F. MAJOR MILESTONES 11
G. KEY STAKEHOLDERS 12
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 12
II. WORK BREAKDOWN STRUCTURE 12
III. RESOURCE LOADED PROJECT SCHEDULE 17
IV. PROJECT SPENDING PLAN 22
V. PROJECT ORGANIZATION AND METHODOLOGY 22
A. PROJECT ORGANIZATIONAL CHART 22
B. PROJECT ROLES AND RESPONSIBILITIES 23
C. PROJECT MANAGEMENT METHODOLOGY 25
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 26
VII. PROJECT RISK MANAGEMENT PLAN 26
VIII. CAPACITY PLAN 26

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Reports Project objective is to eliminate the crystal reports server and move its reports to the data warehouse. This will remove the dependency of reports from the Reconnect database to a system built for efficient analysis and reporting. Moving the reports to the data warehouse leaves more processing power for claimants in the Reconnect system.

The project team will evaluate 311 Crystal Reports to determine:

1. Business Unit awareness of the existence of each report.
2. If the report will, or continues to provide, value to the business unit.
3. If the report can be retired.
4. Translating the report to use the analytical structure so it can be run from the data warehouse.

Although the schedule appears to end beyond the June 28, 2024, project end date, there are some reports that can and will be retired, which will help meet the project end date. The reports that appear after the June 28, 2024, date will move up in schedule as reports are retired.

In this Operational Workplan, the entire list of reports is provided. Future reports will only include those that will be completed by June 28, 2024. The project manager will move reports up in priority as others are retired via validation.

In the event there are reports to be completed beyond the June 28, 2024, date, a decision will be made in June 2024. This decision will be to complete the remainder of the reports via operational product delivery or create an additional project to complete the outstanding reports, if any.

A. Scope Statement

The Project Team will work with Workforce Services to evaluate 311 Crystal Reports to determine if they can be moved from the Crystal Reports Server to the Florida Commerce's Data Warehouse by June 28, 2023. If the report no longer provides value, the report and any related batches will be retired.

The benefit of moving reports from using the Reconnect database to using the data warehouse makes the reports available regardless of the status of Reconnect availability. Removing the dependency from the Reconnect system provides more stability and efficiency for claimants.

In Scope

- 311 Crystal Reports – This includes the existing Crystal Reports on the Reports Server that have not been converted to the data warehouse.
- Minor adjustments and enhancements to existing crystal reports as part of the conversion to the data warehouse.
- Batches – Any batches that are used to generate Crystal Reports will be retired.

Out of Scope

- 20 Reports already converted to the data warehouse via operational product delivery.
- Enhancements to reports already reviewed, approved, and pushed to production in the data warehouse.
- New crystal report requests.
- Building links to the data warehouse from Reconnect is out of scope for this project.
- 40+ Reports deemed unnecessary by business units.

B. Project Objectives and Business Benefits

The older an application such as Crystal Reports, the more it costs to maintain its functionality—to the point where keeping it costs more than the value it provides.

Project Objective	Business Benefit
FloridaCommerce will have a modular foundation that enables continuous modernization	• Provides more efficient tool for reporting/data for staff use. • Provides round-the-clock availability of reports and data. • Removes the dependency on the Reconnect system and improves the modularization of the Reconnect foundation.
Eliminates the Crystal Reports Server	• Allows FloridaCommerce to retire the legacy Crystal Reports server and software at the end of its useful life.
Removes batches (if any) from nightly batch processing	• Removing batches leaves more time for higher priority batch jobs.

C. Critical Success Factors

The following factors are necessary for success.

- Validation of 311 Crystal Reports.
- Retirement of reports that no longer have value.
- Retirement of the Crystal Reports Server
- Operational Reports Page in the data warehouse listing all ex-crystal reports that provide value to Workforce Services.

D. Key Dates

This project takes over an operational effort that started in January 2023. Therefore, a transition was necessary to separate the operational process from higher level project requirements.

The contents of each release represented below will vary greatly until measures for team velocity can be established. Also, the team continues to provide support for high priority production issues such as ETA reports and USDOL Population sample corrections.

Key Date	Importance and Relevance to the Project
September 22, 2023	Transition of operational project to Continuous Improvement Project completed
September 25 – October 16, 2023 Build 322	CRPT 213: Develop Deputy Clerk Productivity Report CRPT 280: Develop Appeals Weekly Time Lapse Report CRPT 236: Develop IP Address Search Report CRPT 281: Develop Wage Audit Predeterminations Report CRPT 188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly
October 16 – November 20, 2023 Build 323	CRPT 112: Develop UC Benefits Payment Register Report in Tableau CRPT 115: Develop Untimely First Payment Report CRPT 211/278: Develop Average Processing Time for Appeals Cases Report CRPT 217: Docketing Productivity Report CRPT 227: Develop Time Lapse Percentage CRPT 237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly CRPT 26: Develop Cumulative Totals Report CRPT 31: Develop Daily, Monthly SSA Statistics Report CRPT371 CanceledNonMonPending CRPT 95/98: Develop STC Summary Report
November 20 – December 18, 2023 Build 324	CRPT 357: Develop Long Term Dated Stops Report CRPT363 Auto Adjudicated JSR Report CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report CRPT 253/255: Develop Earnings Weekly, Monthly, Quarterly, Determinations by Examiner (3 Merged Reports) CRPT377AD DUA Activity - Applications Denied CRPT355 Automated Wage Update Workflow Report
December 8 – January 21, 2024 Build 325	CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner CRPT354 Automated Wage Update Detail Report CRPT283 Blocked Claims Issue CRPT334 Wage_Determination_Issues Report CRPT441 1099G Summary Report CRPT361 Earning Overpayments by Overpaid Weeks Report
January 21 – February 19, 2024	CRPT02 Analysis of Overpayments by Cause

Key Date	Importance and Relevance to the Project
Build 326	CRPT359/360 Appeals Reversals Weekly & Monthly Report (2 Merged Reports) CRPT377 DUA Activity - Applications Denied CRPT11 Claimant Repayment Summary CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue CRPT116L LWA Voucher Payment Summary
February 19 – March 18, 2024 Build 327	CRPT116F FPUC Voucher Payment Summary CRPT117 Waiver Status Report CRPT13 Collection Agency Reconciliation Report CRPT139 Repayment Adjustment Detail Report CRPT144 Released Special Voucher Payments CRPT29 Daily Deposit Report
March 18 – April 15, 2024 Build 328	CRPT33 Debtor Credit Balance Refund Report CRPT 1099g 1099G Detail Screen CRPT05 Benefit Payment Control Cash Offset Activity CRPT373 DUA Applications Report CRPT113 UC Liabilities Report CRPT161/61W Daily REA Productivity Report
April 15 – May 13, 2024 Build 329	CRPT194 STC Plan Review Report CRPT262 Waiting Week Exemption Report CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged) CRPT392 Certification Amounts and Counts CRPT400 Effective Date Change (CWC-FE-X Claims)
May 13 – June 10, 2024 Build 330	CRPT462/462W Daily SAVE Productivity Report CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) CRPT91 Refund Status Report CRPT99 Summary Detail Tax Withholding CRPT245 UCFE-UCX Pending Monetary After 13 Days CRPT247 FL CWC Reject
June 10 – June 30, 2024 Build 331	CRPT248 Out of State (Shell) Claims Reject CRPT249 UCFE AND UCX Reject CRPT251 UCX/UCFE Timely Payment Report CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims CRPT259 Florida Paying CWC CRPT260 INBOUND IB6 Bill
Product Backlog (Approved Reports to do if they can be finished by June 30, 2024)	CRPT266 BTQ Universe CRPT246 BAM Open Cases CRPT274 Wage Audit Overpayment Repayment

Key Date	Importance and Relevance to the Project
	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV CRPT389F Supplemental Overpayment Report CRPT450 1099G All Generated CSV CRPT451 1099G Status Counts Per Output Type CSV
Validating for Need vs Retire	CRPT100 Summary of Daily Disbursement Report CRPT116 Voucher Payment Summary - UB2152-UB215 CRPT152 Pre-Certification Details Report CRPT183 ETA 9056 (Renee Grubb) CRPT185 ETA TAPR (Kenton Buggs, Yolanda Triplet) CRPT186 ETA TAPR Trade Activity Participant Report (Kenton Buggs, Yolanda Triplet) CRPT191 ETA 9128u - Reemployment Services and Reemployment and Eligibility Assessments for EUC Claimants (Erik Wood) CRPT192 Payments Held for Review (HDEX) CSV CRPT195 Manual Payments Detail CRPT228 Time Lapse Statistics CRPT232 Agency New Hire Report CRPT233 On-demand EFT Deposit Report CRPT239 Regional Workforce Breakdown of ETA 9129 (Erik Wood) CRPT240 CHECK FOR NEW UI ELIGIBILITY CRPT243 Reimbursable Employer Monthly Charge CSV CRPT244 DUA Claims Terminated CRPT250 New Hire Late ADJ Fact-Finding Notifications CRPT257 Failed Document Status After Nightly Batch CRPT258 QBC Report CSV (Part of Connect Workflow--OI: Sushma - Reporting function in Visual Studios .NET--Reconnect Change) CRPT263 Unidentified Employer Protest Documents Queue CRPT264 Process Response to Notice of Claim Queue CRPT267 FSDEB CSV (On Hold - Correct BU) CRPT269 FL DEBC Payments CRPT270 Filed Appeals and Overpayment CRPT271 Disposed Appeals and Overpayment CRPT275S 13082 Sally DUA Appeals Disposed Report CRPT277 Straight DUA - UCFE, UCX, CWC Claims CRPT279 BIU-Wage Audit Adjudicator Wokflow

Key Date	Importance and Relevance to the Project
	CRPT282 PRNC Closed Work Items (On Hold - by Business Unit - need reason) CRPT284 Release HDID Report CRPT285 IB6I BILL STATUS CRPT286 Detailed Untimely/Timely 1st Pay Report CRPT287 Claims That Become Unlocked CRPT288 Issues In-Progress Status Non-SOL Daily Report CRPT289 BIU Appeals Decisions Notices CRPT290 Debit Card Rejects Report CRPT291 Child Support Percentage CRPT294 Pending Monetary CSV CRPT295 All UCO2 generated CRPT296 UC02 Not generated due to Locked Claimants or Claims list CRPT297 UCO2 Status Counts CRPT298 Employers or Agents having more than 100 UCO2s CRPT299 412s Stuck in Pend or Proc CRPT302 Auto-Adjudication Details CRPT303 Adjudicator Quality Nonmon Determinations CRPT304 Outstanding Workflow Items CRPT305 412 Pull Queue report CRPT308 TRA Quarter Activity Counts and Details CRPT309 FIRRE Employer Noncharge Report CRPT310 Reopen After Wait Week Report CRPT311 Collection Agency Exclusion list CRPT313 Work_Items_Closed - Terminated_Daily Report CRPT314 EARN Issues Pending Report CSV CRPT315 ICON Matrix (UCX-UCFE) Report CRPT316 Equifax Inbound FED4 Electronic Responses CRPT317 Staff Handled Monetary Determination and Redeterminations CRPT318 Issue Creation Report CRPT319 Waived Overpayments Report CRPT321 CWAS Queue Month to Month Report CRPT323 New Work Items All Staff Counts Report CRPT327 Payments by County of Residence CRPT328 412 Employer Protest Pending Queue Items Report CRPT329 412 Employer Protest Worked Queue Items Report CRPT330 Appeals Metrics Report CRPT331 Earnings and Remuneration Stuck as Affirmed Report

Key Date	Importance and Relevance to the Project
	CRPT333 PRNC Priority Items Report CRPT335 Voucher Details CRPT337 Workflow Queue Report CRPT339 Taxes Paid on Locked Claims Report CRPT34 Claims Purged Report CRPT340 NDNH New Hire Fictitious Employers Report CRPT341 Wage report for claims requesting monetary reconsideration CRPT343 SIDES Failed Separation Posts CRPT344 SIDES Failed Earnings Verification Posts CRPT345 SIDES Earnings Verification Response Report CRPT347 Benefits by County of Residence Monthly CRPT348 Benefits by County of Residence Annually CRPT349 Civil Court Collections CRPT350 Deceased Claimant Report CRPT351 UCFE Claim Register Report (Aisha Bryson and Tiffany Cohee) CRPT352 UCX Claim Register Report (Aisha Bryson and Tiffany Cohee CRPT364 Daily Reporting Requirement Issues Report CRPT365 SAVE Work authorization Report CRPT366 Lack of Work queue list Report CRPT367 Employer/TPA Login Counts Report CRPT370 CNCL_Adjudication_weekly CSV CRPT372 CNCL_Adjudication_Daily CSV CRPT373S 13082 Sally DUA Application Report CRPT374 DUA Federal Management Report CRPT375 DUA Adjudication Report CRPT375S 13082 Sally DUA Adjudication Report CRPT376 DUA Audit - Payments Report CRPT377S 13082 Sally DUA Activity Report CRPT379 All Cases Assigned by Staff Outside Batch 265 CRPT385 Adjudicator Data Determination Weekly CSV CRPT386 Adjudicator Void Weekly CSV CRPT387 Adjudicator Auto Adjudication Weekly CSV CRPT391S 13082 Sally DUA Appeals Filed Report CRPT393 Pre-Certification Amounts and Counts Pre-Certification Amounts and Counts CRPT395 Straight DUA Adjudication Timely Payment CRPT396 DUA Related Timely Payment CRPT397 Pending DUA Workload Items CRPT401 IB4Q Inbound Daily Report

Key Date	Importance and Relevance to the Project
	CRPT402 FL CWC Recoverable Overpayment Report CRPT403 Apply for PUA Link CRPT404 Expired Claims CRPT405 Exhausted Claims CRPT406 Annual Overpayments Established by Month CRPT407 1720A_Referred CRPT408 1720B_Not_Referred CRPT409 1720C_Written_Off_Waived CRPT40DD DUA Financial Daily - Straight DUA CRPT40DR DUA Financial Daily - Related DUA CRPT41 DUA-UI-ISSUES CRPT410 Corrected Earnings Report for Auto Requested Weeks CRPT411 Workflow SCIN Productivity CRPT412 Workflow SCIN New and In Progress CRPT413 Workflow SCIN Backlog CRPT414 Workflow Returned Mail Productivity CRPT415 Workflow Returned Mail New and In Progress CRPT416 Workflow Returned Mail Backlog CRPT417 Claimants_PEUC_NO_Weeks CSV CRPT418 Claimants_PUA_NO_Weeks CSV CRPT419 RA_Mon_Eligible_No_Weeks CSV CRPT420 Claim Counts by FIRRE State Montly Report CRPT423 Debit Card Payment Recovery CRPT424 State_And_Federal_Program_(RA, PEUC, EB, PUA)_Payments CSV CRPT424F Supplemental_(FPUC, LWA, MEUC, WW)_Payment CSV CRPT425 PEGA Unregistered Claim Count CRPT428 Open EIRP Workflow Items CSV CRPT429 Daily Report of Ingested Pega Claims to CONNECT CSV CRPT430 COVID-19 Adjudication report CSV CRPT431 COVID-19 Appeals Filed report CRPT432 COVID-19 Appeals Disposed report CRPT433 COVID-19 Applications report CSV CRPT437 Debit Card list for Communication CRPT438 Pending Monetary Managment Workflow Queue CRPT439 Open and Pend CWAS Workflows CRPT444 UC_Benefit_Payments CSV CRPT452 1099G Amount For Each Claimant CSV CRPT453 49T All Generated CSV CRPT454 49T Status Counts Per Output Type CSV CRPT455 49T Amount Greater Than $1 CSV

Key Date	Importance and Relevance to the Project
	CRPT457 SOL Wage Issues Report CSV CRPT458 Supplemental (FPUC, LWA, MEUC, WW) Payments Issued on Locked Claims CRPT459 Overpayments Eligible for Collection Agency Referral CRPT59 Manual Charge Relief Report CRPT72 NM QIP SATA - MONTHLY (Need Owner) CRPT79F Supplemental Overpayments Established for the Month CSV CRPT85 Processed Cancelled and Replacement Payments DATETIME CRPT874 ALM109874_RFI_ETA539 (Michael Craft) CRPT92 Reissue Payment -UB2681-RQLST CRPT93 Report of Good/Not Good Job Prospects_SRR

E. Major Deliverables

Major Deliverable	Deliverable Description
Project Management Plan	A Project management plan is a formal, approved document that defines how the project is executed, monitored, and controlled
Project Products (Reports)	Products are the value delivered to the customer during the project. They are the reason the project exists.
Project Closeout Report	A project closure report is a document that summarizes the results of a project. It includes the team's accomplishments, lessons learned, and recommendations for improving upon future projects.

F. Major Milestones

Major Milestone	Milestone Description
Operation to Project Transition – September 22, 2023	Closed all operational tasks and created project schedule for Reports Project.
Build 322 - October 16, 2023	Delivery of 5 Reports
Build 323 - November 20, 2023	Delivery of 6 Reports
Build 324 - December 18, 2023	Delivery of 6 Reports
Build 325 - January 21, 2024	Delivery of 6 Reports
Build 326 - February 18, 2024	Delivery of 6 Reports
Build 327 - March 17, 2024	Delivery of 6 Reports
Build 328 - April 15, 2024	Delivery of 6 Reports
Build 329 – May 12, 2024	Delivery of 6 Reports
Build 330 – June 10, 2024	Delivery of 6 Reports
Build 331 - June 30, 2024	Delivery of 6 Reports
June 30, 2024	Project Closure, Transition to Operations

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicole Sanislow and Karmyn Hill	Project Owner
Jim Sparks	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. Some functional design documents do not exist for some of the 331 reports and will have to be written.
2. Some reports may not be known to business units.
3. Some reports will no longer be needed.
4. Reports will exist in the data warehouse and all who need access will be given access rights.
5. Not all 311 reports will be transitioned to the data warehouse.

Project Constraints

1. The project must end by June 30, 2024, regardless of remaining reports.
2. Project Team availability is shared with other priorities, (production support for USDOL Audit Requests, ETA reports, existing crystal reports, USDOL Sample population validation, etc.)

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
0	Reports
1	Project Management
1.1	Discovery/Initiation
1.1.1	4.1 Project Charter Creation
1.1.2	13.1 Identification of Stakeholders

WBS	Task Name
1.2	Planning
1.2.1	4.2 Develop Project Management Plan
1.2.2	5.1 Plan Scope Management
1.2.3	5.2 Collect Project Requirements
1.2.4	5.3 Define Scope
1.2.5	5.4 Create WBS
1.2.6	6.1 Plan Schedule Management
1.2.7	6.2 Define Activities
1.2.8	6.3 Sequence Activities
1.2.9	6.4 Estimate Activity Durations
1.2.10	6.5 Develop Schedule
1.2.11	8.1 Plan Quality Management
1.2.12	9.1 Plan Resource Management
1.2.13	9.2 Estimate Activity Resources
1.2.14	10.1 Plan Communications Management
1.2.15	13.2 Plan Stakeholder Engagement
1.3	Executing
1.3.1	4.3 Track Project Work
1.3.2	10.2 Manage Communications
1.3.3	13.3 Manage Stakeholder Engagement
1.4	Monitor & Control
1.4.1	4.5 Monitor & Control Project Work
1.4.2	5.5 Validate Scope
1.4.3	5.6 Control Scope
1.4.4	6.6 Control Schedule
1.4.5	10.3 Monitor Communications
1.4.6	11.7 Monitor Risks
1.4.7	13.4 Manage Stakeholder Engagement
1.5	Closing
1.5.1	4.7 Close Project or Phase
2	Benefits Identification and Measures
2.1	Evaluate Sources of Crystal Reports and Related Batches
2.2	Collect Infrastructure Related Crystal Report budget costs
2.3	Identify Measures for Maximizing Work Not Done
2.3.1	Calculate Average Pipeline Length - Start of Requirements to Push to Prod
2.3.2	Calculate Maximized Work Not Done (Formula to use)
2.4	Collect Snowflake Costs for Crystal Reports (if possible)
2.5	Create/Maintain Crystal to Snowflake Comparison Report
3	Reports Process Operational Support

WBS	Task Name
3.1	Integrate RAD Reporting Requests into Service Now
3.2	Create/Discover Process for Reports Access
4	Product Delivery
4.1	Operational Project Transition Completed
4.2	CRPT07 Child Support Options
4.3	CRPT111 UC Bank Payment Processing Exceptions
4.4	CRPT114 UC Payment Summary
4.5	CRPT12 Claims Filed (By Process Date)
4.6	CRPT151 Weely Hearing Results
4.7	CRPT210 Appeals Case Decisions
4.8	CRPT212 Case Aging Report
4.9	CRPT214 Disposition Corrected Decisions
4.1	CRPT216 Docketed Disposed Pending with Time Lapse
4.11	CRPT219 Hearing Officer Postponements
4.12	CRPT224 Referee Productivity Report
4.13	CRPT226 Statewide Docketed Disposed Pending Report
4.14	CRPT229 TRA - Trade Readjustment Act Appeals Report
4.15	CRPT275 DUA Appeals Disposed
4.16	CRPT28 Daily Claims Entry Totals
4.17	CRPT306 Claimants with Out of State Benefits
4.18	CRPT358 STC Claims with Pending ADJ Issues Weekly
4.19	CRPT369 First Pay Due Report
4.2	CRPT391 DUA Appeals Filed
4.21	Release 322 - 10/15/2023
4.21.1	CRPT213: Develop Deputy Clerk Productivity Report (322)
4.21.2	CRPT280: Develop Appeals Weekly Time Lapse Report (322)
4.21.3	CRPT236: Develop IP Address Search Report (322)
4.21.4	CRPT281: Develop Wage Audit Predeterminations Report (322)
4.21.5	CRPT188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly (322)
4.22	Release - 323 - 11/19/2023
4.22.1	CRPT112: Develop UC Benefits Payment Register Report in Tableau (323)
4.22.2	CRPT115: Develop Untimely First Payment Report (323)
4.22.3	CRPT211/278: Develop Average Processing Time for Appeals Cases Report (323)
4.22.4	CRPT217: Develop Docketing Productivity Report (323)
4.22.5	CRPT227: Develop Time Lapse Percentage (323)
4.22.6	CRPT237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly (323)
4.22.7	CRPT26: Develop Cumulative Totals Report (323)
4.22.8	CRPT31: Develop Daily, Monthly SSA Statistics Report (323)

WBS	Task Name
4.22.9	CRPT371 CanceledNonMonPending (323)
4.22.10	CRPT95/98: Develop STC Summary Report (323)
4.23	Release - 324 - 12/17/2023 (CodeCutOff-12/15)
4.23.1	CRPT357: Develop Long Term Dated Stops Report (324)
4.23.2	CRPT363 Auto Adjudicated JSR Report (324)
4.23.3	CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report (324)
4.23.4	CRPT253/255: Develop Earnings Weekly, Monthly Determinations by Examiner (Merged Weekly/Monthly/Quarterly) (324)
4.23.5	CRPT377AD DUA Activity - Applications Denied (324)
4.23.6	CRPT355 Automated Wage Update Workflow Report (324)
4.24	Release - 325 - 01/21/2024 (CodeCutOff-01/19)
4.24.1	CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner (325)
4.24.2	CRPT354 Automated Wage Update Detail Report (325)
4.24.3	CRPT283 Blocked Claims Issue (325)
4.24.4	CRPT334 Wage_Determination_Issues Report (325)
4.24.5	CRPT441 1099G Summary Report (325)
4.24.6	CRPT361 Earning Overpayments by Overpaid Weeks Report (325)
4.25	Targeted for Release - 326 - 02/18/2024 (CodeCutOff - 02/16)
4.25.1	CRPT02 Analysis of Overpayments by Cause (327)
4.25.2	CRPT359/360: Appeals Reversals Weekly Report (Merged Weekly/Monthly) (326)
4.25.3	CRPT377 DUA Activity - Applications Denied (326)
4.25.4	CRPT11 Claimant Repayment Summary (327)
4.25.5	CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue (327)
4.25.6	CRPT116L LWA Voucher Payment Summary (326)
4.26	Ready for Release - 327 - 03/17/2024 (CodeCutOff - 03/15)
4.27	Ready for Release - 328 - 04/14/2024) (CodeCutOff - 04/12)
4.28	Ready for Release - 329 - 05/12/2024) (CodeCutOff - 05/11)
4.29	Ready for Release - 330 - 06/09/2024) (CodeCutOff - 06/07)
4.3	Ready for Release - 331 - 06/30/2024) (CodeCutOff - 06/28)
4.31	UAT
4.32	In Development/Unit Testing
4.32.1	CRPT116F FPUC Voucher Payment Summary (327)
4.32.2	CRPT117 Waiver Status Report (327)
4.32.3	CRPT13 Collection Agency Reconciliation Report (327)
4.32.4	CRPT139 Repayment Adjustment Detail Report (327)
4.32.5	CRPT144 Released Special Voucher Payments (327)
4.32.6	CRPT29 Daily Deposit Report (327)
4.32.7	CRPT33 Debtor Credit Balance Refund Report (328)
4.32.8	CRPT 1099g 1099G Detail Screen (328)

WBS	Task Name
4.33	PBI Refinement (Product Backlog)
4.33.1	CRPT05 Benefit Payment Control Cash Offset Activity (328)
4.33.2	CRPT373 DUA Applications Report (328)
4.33.3	CRPT113 UC Liabilities Report (328)
4.33.4	CRPT161/161W Daily REA Productivity Report (328)
4.33.5	CRPT194 STC Plan Review Report (329)
4.33.6	CRPT262 Waiting Week Exemption Report (329)
4.33.7	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims (329)
4.33.8	CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged)(329)
4.33.9	CRPT392 Certification Amounts and Counts (329)
4.33.10	CRPT400 Effective Date Change (CWC-FE-X Claims) (329)
4.33.11	CRPT462/462W Daily SAVE Productivity Report (330)
4.33.12	CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) (330)
4.33.13	CRPT91 Refund Status Report (330)
4.33.14	CRPT99 Summary Detail Tax Withholding (330)
4.33.15	CRPT245 UCFE-UCX Pending Monetary After 13 Days (330)
4.33.16	CRPT247 FL CWC Reject (330)
4.33.17	CRPT248 Out of State (Shell) Claims Reject (331)
4.33.18	CRPT249 UCFE AND UCX Reject (331)
4.33.19	CRPT251 UCX/UCFE Timely Payment Report (331)
4.33.20	CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims (331)
4.33.21	CRPT259 Florida Paying CWC (331)
4.33.22	CRPT260 INBOUND IB6 Bill (331)
4.34	In SRR Approval Routing
4.35	Documenting SRR
4.35.1	CRPT193/193F Overpayments Held for Review
4.35.2	CRPT196 RETRO HOLD REPORT
4.35.3	CRPT197 FALL THROUGH OVERPAYMENTS
4.35.4	CRPT261 BPC Appeals Hearing
4.36	In Requirements Phase
4.36.1	CRPT266 BTQ Universe
4.36.2	CRPT246 BAM Open Cases
4.36.3	CRPT274 Wage Audit Overpayment Repayment
4.36.4	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV
4.36.5	CRPT389F Supplemental Overpayment Report
4.36.6	CRPT450 1099G All Generated CSV
4.36.7	CRPT451 1099G Status Counts Per Output Type CSV
5	Not Needed

III. Resource Loaded Project Schedule

The RAD Data Warehouse Team are assigned to every task.

WBS	Task Name	Duration	Start	Finish
0	**Reports**	**259 days**	**Wed 7/5/23**	**Sun 6/30/24**
1	**Project Management**	**258 days**	**Wed 7/5/23**	**Fri 6/28/24**
1.1	**Discovery/Initiation**	**107 days**	**Wed 7/5/23**	**Thu 11/30/23**
1.1.1	**4.1 Project Charter Creation**	**104 days**	**Wed 7/5/23**	**Mon 11/27/23**
1.1.2	**13.1 Identification of Stakeholders**	**3 days**	**Tue 11/28/23**	**Thu 11/30/23**
1.2	**Planning**	**119 days**	**Tue 8/29/23**	**Fri 2/9/24**
1.2.1	**4.2 Develop Project Management Plan**	**11 days**	**Fri 1/26/24**	**Fri 2/9/24**
1.2.2	5.1 Plan Scope Management	10 days	Tue 11/14/23	Mon 11/27/23
1.2.3	5.2 Collect Project Requirements	10 days	Tue 11/14/23	Mon 11/27/23
1.2.4	5.3 Define Scope	65 days	Tue 8/29/23	Mon 11/27/23
1.2.5	5.4 Create WBS	60 days	Tue 9/5/23	Mon 11/27/23
1.2.6	6.1 Plan Schedule Management	60 days	Tue 9/5/23	Mon 11/27/23
1.2.7	6.2 Define Activities	60 days	Tue 9/5/23	Mon 11/27/23
1.2.8	6.3 Sequence Activities	60 days	Tue 9/5/23	Mon 11/27/23
1.2.9	6.4 Estimate Activity Durations	60 days	Tue 9/5/23	Mon 11/27/23
1.2.10	6.5 Develop Schedule	61 days	Mon 9/4/23	Mon 11/27/23
1.2.11	8.1 Plan Quality Management	60 days	Tue 9/5/23	Mon 11/27/23
1.2.12	9.1 Plan Resource Management	60 days	Tue 9/5/23	Mon 11/27/23
1.2.13	9.2 Estimate Activity Resources	10 days	Tue 11/14/23	Mon 11/27/23
1.2.14	10.1 Plan Communications Management	10 days	Tue 11/14/23	Mon 11/27/23
1.2.15	13.2 Plan Stakeholder Engagement	10 days	Tue 11/14/23	Mon 11/27/23
1.3	**Executing**	**250 days**	**Wed 7/5/23**	**Tue 6/18/24**
1.3.1	4.3 Track Project Work	250 days	Wed 7/5/23	Tue 6/18/24
1.3.2	10.2 Manage Communications	250 days	Wed 7/5/23	Tue 6/18/24
1.3.3	13.3 Manage Stakeholder Engagement	250 days	Wed 7/5/23	Tue 6/18/24
1.4	**Monitor & Control**	**250 days**	**Wed 7/5/23**	**Tue 6/18/24**
1.4.1	4.5 Monitor & Control Project Work	250 days	Wed 7/5/23	Tue 6/18/24
1.4.2	5.5 Validate Scope	250 days	Wed 7/5/23	Tue 6/18/24
1.4.3	5.6 Control Scope	250 days	Wed 7/5/23	Tue 6/18/24
1.4.4	6.6 Control Schedule	250 days	Wed 7/5/23	Tue 6/18/24

WBS	Task Name	Duration	Start	Finish
1.4.5	10.3 Monitor Communications	250 days	Wed 7/5/23	Tue 6/18/24
1.4.6	11.7 Monitor Risks	250 days	Wed 7/5/23	Tue 6/18/24
1.4.7	13.4 Manage Stakeholder Engagement	250 days	Wed 7/5/23	Tue 6/18/24
1.5	**Closing**	**8 days**	**Wed 6/19/24**	**Fri 6/28/24**
1.5.1	4.7 Close Project or Phase	8 days	Wed 6/19/24	Fri 6/28/24
2	**Benefits Identification and Measures**	**250 days**	**Wed 7/5/23**	**Tue 6/18/24**
2.1	Evaluate Sources of Crystal Reports and Related Batches	250 days	Wed 7/5/23	Tue 6/18/24
2.2	Collect Infrastructure Related Crystal Report budget costs	250 days	Wed 7/5/23	Tue 6/18/24
2.3	**Identify Measures for Maximizing Work Not Done**	**120 days**	**Wed 7/5/23**	**Tue 12/19/23**
2.3.1	Calculate Average Pipeline Length - Start of Requirements to Push to Prod	60 days	Wed 7/5/23	Tue 9/26/23
2.3.2	Calculate Maximized Work Not Done (Formula to use)	120 days	Wed 7/5/23	Tue 12/19/23
2.4	Collect Snowflake Costs for Crystal Reports (if possible)	20 days	Mon 2/5/24	Fri 3/1/24
2.5	Create/Maintain Crystal to Snowflake Comparison Report	20 days	Wed 12/20/23	Tue 1/16/24
3	**Reports Process Operational Support**	**5 days**	**Mon 10/9/23**	**Fri 10/13/23**
3.1	Integrate RAD Reporting Requests into Service Now	5 days	Mon 10/9/23	Fri 10/13/23
3.2	Create/Discover Process for Reports Access	5 days	Mon 10/9/23	Fri 10/13/23
4	**Product Delivery**	**259 days**	**Wed 7/5/23**	**Sun 6/30/24**
4.1	Operational Project Transition Completed	60 days	Wed 7/5/23	Tue 9/26/23
4.2	CRPT07 Child Support Options	0 days	Wed 7/5/23	Wed 7/5/23
4.3	CRPT111 UC Bank Payment Processing Exceptions	0 days	Wed 7/5/23	Wed 7/5/23
4.4	CRPT114 UC Payment Summary	0 days	Wed 7/5/23	Wed 7/5/23
4.5	CRPT12 Claims Filed (By Process Date)	0 days	Wed 7/5/23	Wed 7/5/23
4.6	CRPT151 Weely Hearing Results	0 days	Wed 7/5/23	Wed 7/5/23
4.7	CRPT210 Appeals Case Decisions	0 days	Wed 7/5/23	Wed 7/5/23
4.8	CRPT212 Case Aging Report	0 days	Wed 7/5/23	Wed 7/5/23
4.9	CRPT214 Disposition Corrected Decisions	0 days	Wed 7/5/23	Wed 7/5/23
4.1	CRPT216 Docketed Disposed Pending with Time Lapse	0 days	Wed 7/5/23	Wed 7/5/23
4.11	CRPT219 Hearing Officer Postponements	0 days	Wed 7/5/23	Wed 7/5/23
4.12	CRPT224 Referee Productivity Report	0 days	Wed 7/5/23	Wed 7/5/23
4.13	CRPT226 Statewide Docketed Disposed Pending Report	0 days	Wed 7/5/23	Wed 7/5/23
4.14	CRPT229 TRA - Trade Readjustment Act Appeals Report	0 days	Wed 7/5/23	Wed 7/5/23
4.15	CRPT275 DUA Appeals Disposed	0 days	Wed 7/5/23	Wed 7/5/23
4.16	CRPT28 Daily Claims Entry Totals	0 days	Wed 7/5/23	Wed 7/5/23
4.17	CRPT306 Claimants with Out of State Benefits	0 days	Wed 7/5/23	Wed 7/5/23

WBS	Task Name	Duration	Start	Finish
4.18	CRPT358 STC Claims with Pending ADJ Issues Weekly	0 days	Wed 7/5/23	Wed 7/5/23
4.19	CRPT369 First Pay Due Report	0 days	Wed 7/5/23	Wed 7/5/23
4.2	CRPT391 DUA Appeals Filed	0 days	Wed 7/5/23	Wed 7/5/23
4.21	**Release 322 - 10/15/2023**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.21.1	**CRPT213: Develop Deputy Clerk Productivity Report (322)**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.21.2	**CRPT280: Develop Appeals Weekly Time Lapse Report (322)**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.21.3	**CRPT236: Develop IP Address Search Report (322)**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.21.4	**CRPT281: Develop Wage Audit Predeterminations Report (322)**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.21.5	**CRPT188: Develop Staff Assisted Initial Claims Report - Monthly, Daily, Quarterly (322)**	**16 days**	**Mon 9/25/23**	**Mon 10/16/23**
4.22	**Release - 323 - 11/19/2023**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.1	**CRPT112: Develop UC Benefits Payment Register Report in Tableau (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.2	**CRPT115: Develop Untimely First Payment Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.3	**CRPT211/278: Develop Average Processing Time for Appeals Cases Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.4	**CRPT217: Develop Docketing Productivity Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.5	**CRPT227: Develop Time Lapse Percentage (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.6	**CRPT237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.7	**CRPT26: Develop Cumulative Totals Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.8	**CRPT31: Develop Daily, Monthly SSA Statistics Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.22.9	**CRPT371 CanceledNonMonPending (323)**	**16 days**	**Mon 10/30/23**	**Mon 11/20/23**
4.22.10	**CRPT95/98: Develop STC Summary Report (323)**	**41 days**	**Mon 9/25/23**	**Mon 11/20/23**
4.23	**Release - 324 - 12/17/2023 (CodeCutOff-12/15)**	**61 days**	**Mon 9/25/23**	**Mon 12/18/23**
4.23.1	**CRPT357: Develop Long Term Dated Stops Report (324)**	**36 days**	**Mon 10/30/23**	**Mon 12/18/23**
4.23.2	**CRPT363 Auto Adjudicated JSR Report (324)**	**36 days**	**Mon 10/30/23**	**Mon 12/18/23**
4.23.3	**CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report (324)**	**36 days**	**Mon 10/30/23**	**Mon 12/18/23**
4.23.4	**CRPT253/255: Develop Earnings Weekly, Monthly Determinations by Examiner (Merged Weekly/Monthly/Quarterly) (324)**	**61 days**	**Mon 9/25/23**	**Mon 12/18/23**
4.23.5	**CRPT377AD DUA Activity - Applications Denied (324)**	**37 days**	**Fri 10/27/23**	**Mon 12/18/23**

WBS	Task Name	Duration	Start	Finish
4.23.6	**CRPT355 Automated Wage Update Workflow Report (324)**	**36 days**	**Mon 10/30/23**	**Mon 12/18/23**
4.24	**Release - 325 - 01/21/2024 (CodeCutOff-01/19)**	**86 days**	**Mon 9/25/23**	**Mon 1/22/24**
4.24.1	**CRPT254/256 Earnings Weekly/Monthly Redeterminations by Examiner (325)**	**84 days**	**Wed 9/27/23**	**Mon 1/22/24**
4.24.2	**CRPT354 Automated Wage Update Detail Report (325)**	**61 days**	**Mon 10/30/23**	**Mon 1/22/24**
4.24.3	**CRPT283 Blocked Claims Issue (325)**	**61 days**	**Mon 10/30/23**	**Mon 1/22/24**
4.24.4	**CRPT334 Wage_Determination_Issues Report (325)**	**61 days**	**Mon 10/30/23**	**Mon 1/22/24**
4.24.5	**CRPT441 1099G Summary Report (325)**	**86 days**	**Mon 9/25/23**	**Mon 1/22/24**
4.24.6	**CRPT361 Earning Overpayments by Overpaid Weeks Report (325)**	**61 days**	**Mon 10/30/23**	**Mon 1/22/24**
4.25	**Targeted for Release - 326 - 02/18/2024 (CodeCutOff - 02/16)**	**127 days**	**Fri 8/25/23**	**Mon 2/19/24**
4.25.1	**CRPT02 Analysis of Overpayments by Cause (327)**	**127 days**	**Fri 8/25/23**	**Mon 2/19/24**
4.25.2	**CRPT359/360: Appeals Reversals Weekly Report (Merged Weekly/Monthly) (326)**	**81 days**	**Mon 10/30/23**	**Mon 2/19/24**
4.25.3	**CRPT377 DUA Activity - Applications Denied (326)**	**81 days**	**Mon 10/30/23**	**Mon 2/19/24**
4.25.4	**CRPT11 Claimant Repayment Summary (327)**	**81 days**	**Mon 10/30/23**	**Mon 2/19/24**
4.25.5	**CRPT265/265D/265M/265WD Protest Benefit Charges Workflow Queue (327)**	**81 days**	**Mon 10/30/23**	**Mon 2/19/24**
4.25.6	**CRPT116L LWA Voucher Payment Summary (326)**	**81 days**	**Mon 10/30/23**	**Mon 2/19/24**
4.26	Ready for Release - 327 - 03/17/2024 (CodeCutOff - 03/15)	0 days	Mon 3/18/24	Mon 3/18/24
4.27	Ready for Release - 328 - 04/14/2024) (CodeCutOff - 04/12)	0 days	Mon 4/15/24	Mon 4/15/24
4.28	Ready for Release - 329 - 05/12/2024) (CodeCutOff - 05/11)	0 days	Mon 5/13/24	Mon 5/13/24
4.29	Ready for Release - 330 - 06/09/2024) (CodeCutOff - 06/07)	0 days	Mon 6/10/24	Mon 6/10/24
4.3	Ready for Release - 331 - 06/30/2024) (CodeCutOff - 06/28)	0 days	Sun 6/30/24	Sun 6/30/24
4.31	UAT	0 days	Fri 8/25/23	Fri 8/25/23
4.32	**In Development/Unit Testing**	**126 days**	**Mon 10/23/23**	**Mon 4/15/24**
4.32.1	**CRPT116F FPUC Voucher Payment Summary (327)**	**101 days**	**Mon 10/30/23**	**Mon 3/18/24**
4.32.2	**CRPT117 Waiver Status Report (327)**	**101 days**	**Mon 10/30/23**	**Mon 3/18/24**
4.32.3	**CRPT13 Collection Agency Reconciliation Report (327)**	**106 days**	**Mon 10/23/23**	**Mon 3/18/24**
4.32.4	**CRPT139 Repayment Adjustment Detail Report (327)**	**101 days**	**Mon 10/30/23**	**Mon 3/18/24**
4.32.5	**CRPT144 Released Special Voucher Payments (327)**	**101 days**	**Mon 10/30/23**	**Mon 3/18/24**

WBS	Task Name	Duration	Start	Finish
4.32.6	**CRPT29 Daily Deposit Report (327)**	**100 days**	**Tue 10/31/23**	**Mon 3/18/24**
4.32.7	**CRPT33 Debtor Credit Balance Refund Report (328)**	**120 days**	**Tue 10/31/23**	**Mon 4/15/24**
4.32.8	**CRPT 1099g 1099G Detail Screen (328)**	**66 days**	**Mon 1/15/24**	**Mon 4/15/24**
4.33	**PBI Refinement (Product Backlog)**	**177 days**	**Fri 10/27/23**	**Sun 6/30/24**
4.33.1	**CRPT05 Benefit Payment Control Cash Offset Activity (328)**	**121 days**	**Mon 10/30/23**	**Mon 4/15/24**
4.33.2	**CRPT373 DUA Applications Report (328)**	**122 days**	**Fri 10/27/23**	**Mon 4/15/24**
4.33.3	**CRPT113 UC Liabilities Report (328)**	**121 days**	**Mon 10/30/23**	**Mon 4/15/24**
4.33.4	**CRPT161/161W Daily REA Productivity Report (328)**	**121 days**	**Mon 10/30/23**	**Mon 4/15/24**
4.33.5	**CRPT194 STC Plan Review Report (329)**	**131 days**	**Mon 11/13/23**	**Mon 5/13/24**
4.33.6	**CRPT262 Waiting Week Exemption Report (329)**	**131 days**	**Mon 11/13/23**	**Mon 5/13/24**
4.33.7	**CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims (329)**	**131 days**	**Mon 11/13/23**	**Mon 5/13/24**
4.33.8	**CRPT35/35D Deposit Detail/Summary Report (35 & 35D Merged)(329)**	**140 days**	**Tue 10/31/23**	**Mon 5/13/24**
4.33.9	**CRPT392 Certification Amounts and Counts (329)**	**131 days**	**Mon 11/13/23**	**Mon 5/13/24**
4.33.10	**CRPT400 Effective Date Change (CWC-FE-X Claims) (329)**	**131 days**	**Mon 11/13/23**	**Mon 5/13/24**
4.33.11	**CRPT462/462W Daily SAVE Productivity Report (330)**	**151 days**	**Mon 11/13/23**	**Mon 6/10/24**
4.33.12	**CRPT324/326/50 Initial and Continued Claims by County of Residence (Weekly) (330)**	**151 days**	**Mon 11/13/23**	**Mon 6/10/24**
4.33.13	**CRPT91 Refund Status Report (330)**	**160 days**	**Tue 10/31/23**	**Mon 6/10/24**
4.33.14	**CRPT99 Summary Detail Tax Withholding (330)**	**161 days**	**Mon 10/30/23**	**Mon 6/10/24**
4.33.15	**CRPT245 UCFE-UCX Pending Monetary After 13 Days (330)**	**103 days**	**Thu 1/18/24**	**Mon 6/10/24**
4.33.16	**CRPT247 FL CWC Reject (330)**	**103 days**	**Thu 1/18/24**	**Mon 6/10/24**
4.33.17	**CRPT248 Out of State (Shell) Claims Reject (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.33.18	**CRPT249 UCFE AND UCX Reject (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.33.19	**CRPT251 UCX/UCFE Timely Payment Report (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.33.20	**CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.33.21	**CRPT259 Florida Paying CWC (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.33.22	**CRPT260 INBOUND IB6 Bill (331)**	**118 days**	**Thu 1/18/24**	**Sun 6/30/24**
4.34	In SRR Approval Routing	0 days	Thu 1/18/24	Thu 1/18/24
4.35	**Documenting SRR**	**147 days**	**Fri 12/8/23**	**Sun 6/30/24**
4.35.1	**CRPT193/193F Overpayments Held for Review**	**115 days**	**Tue 1/23/24**	**Sun 6/30/24**
4.35.2	**CRPT196 RETRO HOLD REPORT**	**115 days**	**Tue 1/23/24**	**Sun 6/30/24**

WBS	Task Name	Duration	Start	Finish
4.35.3	CRPT197 FALL THROUGH OVERPAYMENTS	147 days	Fri 12/8/23	Sun 6/30/24
4.35.4	CRPT261 BPC Appeals Hearing	115 days	Tue 1/23/24	Sun 6/30/24
4.36	In Requirements Phase	112 days	Fri 1/26/24	Sun 6/30/24
4.36.1	CRPT266 BTQ Universe	112 days	Fri 1/26/24	Sun 6/30/24
4.36.2	CRPT246 BAM Open Cases	111 days	Mon 1/29/24	Sun 6/30/24
4.36.3	CRPT274 Wage Audit Overpayment Repayment	111 days	Mon 1/29/24	Sun 6/30/24
4.36.4	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV	111 days	Mon 1/29/24	Sun 6/30/24
4.36.5	CRPT389F Supplemental Overpayment Report	111 days	Mon 1/29/24	Sun 6/30/24
4.36.6	CRPT450 1099G All Generated CSV	111 days	Mon 1/29/24	Sun 6/30/24
4.36.7	CRPT451 1099G Status Counts Per Output Type CSV	111 days	Mon 1/29/24	Sun 6/30/24
5	Not Needed	257 days	Wed 7/5/23	Fri 6/28/24

IV. Project Spending Plan

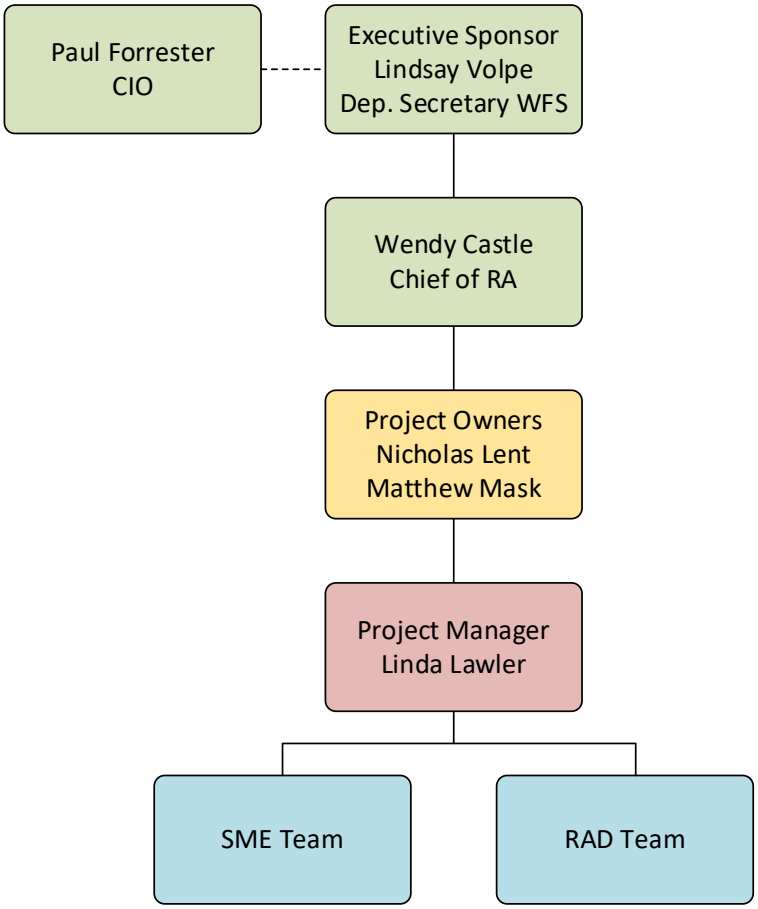
The Reports Project uses existing operational resources, therefore there is no project spend.

FY 2021-22 Expenditures	FY 2022-23 Expenditures	FY 2023-24 Expenditures
Software: $0.00	*Software: $0.00*	*Software: $0.00*
Other OpEx:$0.00	*Other OpEx:$0.00*	*Other OpEx:$0.00*
Other CapEx: $0.00	*Other CapEx: $0.00*	*Other CapEx: $0.00*

V. Project Organization and Methodology

A. Project Organizational Chart

Note: RAD is not an acronym, it’s a name chosen by the team. This is a normal Agile process.



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones

Name	Project Role	Responsibility
Domenic DiLullo	CTO	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Wendy Castle	Chief of RA Program Owner	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	CIO Program Owner	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicholas Lent Matthew Mask	Project Owners	• Contributes subject matter expertise • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests • Reviews deliverables and project documents, identifying any deficiencies • Reviews and approves deliverables
Linda Lawler	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule

Name	Project Role	Responsibility
		• Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
RAD Team	Data Engineers	• Breaks requirements documents into product backlog items • Redesigns reports for the data warehouse • Converts crystal reports to data warehouse reports

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones

- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan
- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

The Reports project uses existing resources so there is no need for capacity planning.

OPERATIONAL WORK PLAN
FOR
ADJUDICATION WORKFLOW MANAGEMENT SYSTEM

DEPARTMENT OF FLORIDA COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023 – 2024
QUARTER 3

PREPARED ON FEBRUARY 2, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 5
D. KEY DATES 5
E. MAJOR DELIVERABLES 5
F. MAJOR MILESTONES 6
G. KEY STAKEHOLDERS 6
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 7
II. WORK BREAKDOWN STRUCTURE 7
III. RESOURCE LOADED PROJECT SCHEDULE 8
IV. PROJECT SPENDING PLAN 9
V. PROJECT ORGANIZATION AND METHODOLOGY 10
A. PROJECT ORGANIZATIONAL CHART 10
B. PROJECT ROLES AND RESPONSIBILITIES 10
C. PROJECT MANAGEMENT METHODOLOGY 13
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 13
VII. PROJECT RISK MANAGEMENT PLAN 14
VIII. CAPACITY PLAN 14

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

As a part of the FloridaCommerce Reemployment Assistance (RA) Modernization Program, the Claims Adjudication process for Reemployment Assistance will be modernized through implementation of an automated Workflow Management solution.

A. Scope Statement

The project will define the streamlined business process for adjudication, identify specific opportunities for automation, gather requirements, design the technical solution, and required interfaces, determine the best technical path forward (e.g., leveraging existing tool and/or custom software development), and implement the solution. The decision is to leverage the existing tool (Pega) to automate and create the Adjudication workflow management solution.

In Scope

- Determine problem statement and requirements.
- Streamline existing business processes & identify opportunities for automation.
- Design a technical solution, interfaces, and integration with Reconnect.
- Develop and test solution using agile software development methodology.
- Conduct integration and UAT testing.
- Conduct training, release planning, and operational turnover.
- Implement solution.

Out of Scope

- Continuing to use Reconnect to perform adjudication workflow management functionality that is being replaced by the solution.

B. Project Objectives and Business Benefits

Currently in the initiation phase and moving to the planning stage next month.

Project Objective	Business Benefit
Integrate the new solution with Reconnect as the system of record transferring data back and forth between Reconnect and the new solution (e.g., Application Programming Interfaces, import/export, batch file transfer, etc.)	• Adjudication decisions will be determined more quickly. • Greater productivity due to improved workflow. • Improved quality measures. • Reduction of calls into the contact center due to faster adjudication decisions determined. • Ability to prioritize and rapidly change directions (e.g., economic downturns, pandemics, natural disasters, etc.). • Ability to harness opportunities for automation will decrease adjudication workloads, improve decision making, and create an increase in the number of claims that may be processed daily.
Gather the requirements that define what the new solution should accomplish.	
Identify the impacts to Reconnect system of record when adjudication process is moved out of that system and identify how to fill any gaps.	
Create Interface Control Documents for each interface and create Service Level Agreements	

Project Objective	Business Benefit
Determine infrastructure requirements and design where and how the solution will be implemented (e.g., cloud, servers, storage capacity, processing speed, internal memory, network, etc.)	• Reduction in appeals workload because adjudication process becomes accurate and timely. • Assist adjudication leadership with monitoring and reporting on adjudication performance. • Allow staff to focus on issuing timely determinations. • Consistency in making determination decisions based on all users reviewing the same intelligent content for guidance during determinations. • Metrics and dashboard for FC Leadership to measure adjudication process. • Improve information flow with claimants, employers, and Third-Party Administrators (TPA) to provide quicker resolutions.
Automate the current manual workaround for assignment of work and quickly allow for redistribution of work.	• Increased speed to first pay for claimants. • Ability to prioritize and rapidly change directions (e.g., economic downturns, pandemics, natural disasters, etc.). • Greater productivity for adjudicators and adjudication leadership. • Improved quality measures. • Allow staff to focus on issuing timely determinations vs manually assigning work.
Review the current adjudication work flows to identify more efficient and streamlined ways to accomplish the work.	• Increased speed to first pay for claimants. • Greater productivity for adjudicators and adjudication leadership. • Improved quality measures. • Less calls to the contact center because of increased accuracy during adjudication.
Design wireframes that mimic the workflows.	
Locate the issues that are suitable for automation and define the steps and/or business rules required to automate those issues.	• Ability to harness opportunities for automation will decrease adjudication workloads, improve decision making, and create an increase in the number of claims that may be processed daily. • Allow staff to focus on issuing timely determinations.
Gather the websites, documents and reference materials required to make determinations and prepare them for implementation into content sensitive help.	• Consistency in making determination decisions based on all users reviewing the same intelligent content for guidance during determinations. • Reduction in appeals workload because adjudication process becomes accurate and timely.
Identify the reports required to meet FloridaCommerce management goals (dashboards, metrics, workload reports, assignment reports, priority reports, etc.)	• Assist adjudication leadership with monitoring and reporting on adjudication performance. • Metrics and dashboard for FL Commerce Leadership to measure adjudication process. • Improved quality measures
Define the team and departmental performance metrics being used to measure and track efficiencies.	

C. Critical Success Factors

- Sufficient FloridaCommerce architects and IT staff to create the interface with Reconnect (system of record) and integrate with the new Adjudication Workflow System.

D. Key Dates

Key Date	Importance and Relevance to the Project
December 15, 2023	Initiation Phase complete; Rule 60GG documents created & approved (Charter/Business Case)
January 10, 2023	Complete the Planning Phase; Rule 60GG documents created & approved; Project Requirements defined/approved; Test Plan completed/approved
January 26, 2024	Sprint Zero JADs to Develop Backlog; Definition of sprint roadmap & scope
May 14, 2024	Project Development Completed
June 20, 2024	Testing & Execution Phases Completed
June 28, 2024	Project Closeout Completed

E. Major Deliverables

Major Deliverable	Deliverable Description
Project Charter	Description of project with authority to move forward
Project Business Case	Description alternative analysis; business process to be modernized; success criteria; risks, costs; stakeholder impacts
Schedule	Timeline for project
Requirements	List of what the solution should accomplish
Project Management Plan	Description of how the project will be executed
Solution Design Document	Create & document how the solution will function to meet requirements
Solution Development/Testing Sprints; User Stories; Product Backlog; Test Plan; UAT Test Plan; Requirements Traceability Matrix	Create the solution and test to determine that it meets the requirements. This will be incremental by sprint using agile development methodology.
Solution Implementation Plan; Training Plan; Help Desk Support Plan	Develop release plan, train the users, prepare help desk for support of solution, move the solution to production, complete security artifacts, develop proper documentation
Solution Maintenance & Support	Monitor the solution and ensure updates are completed timely.
Project Close Out Report	A report of project closure using Center of Excellence template.

F. Major Milestones

Major Milestone	Milestone Description
Initiation Phase • Business Case • Charter • RCA Phase Gate Stakeholder Registry	Completion of Rule 60GG deliverables (i.e., charter, business case, stakeholder registry, etc.)
Planning Phase • Buy vs Build Decision • PMP • Schedule • Test Plan (High-Level) RCA Phase Gate	Completion of Project Management Plan, Schedule, Test Plan, RCA Phase Gate
Execution Phase • Design Completed • Development/Unit Test Completed • Integration/UAT Testing Completed • Implementation Completed Transfer to Maintenance & Operations	Completion of execution deliverables (i.e., design, development, implementation, maintenance & operations)
Close Out Phase • Perform Close Out Activities Close Out Report	Completion of the project

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Program Owner / Work Group
Tisha Womack	Chief Financial Officer
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Johnathan Hill	Project Owner
Clara Kendrick	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. Completed: FloridaCommerce will make a buy vs build decision in a timely manner.
2. Completed: FloridaCommerce will conduct the procurement process efficiently and there will be no delays to obtaining a COTs product.
3. Completed: There will be qualified vendors responding to the procurement with a satisfactory COTS product that meets the 'must have' requirements if the decision is to buy a product.
4. There will be sufficient FloridaCommerce architects and IT staff to create the interface with Reconnect (system of record) and integrate with the new Adjudication Workflow System.

Project Constraints

1. The project budget and the timeline to implement the Adjudication Workflow Management system are major constraints to the project.
2. Available FloridaCommerce resources during specific phases of the project may constrain the project.
3. The ability and how to technically integrate with Reconnect (the system of record) constrains the project.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

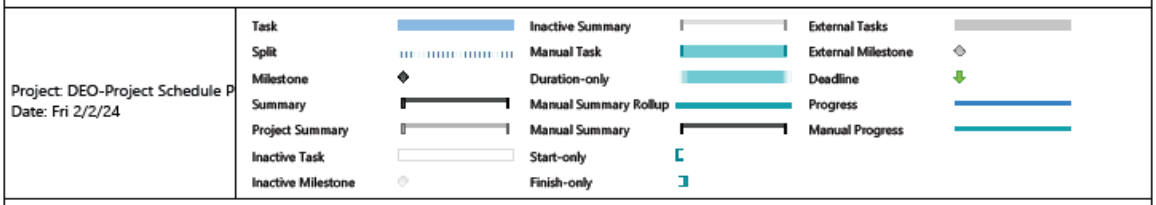
- Adjudication Workflow Management System
  - Initiation
    - Risk and Complexity Assessment
    - Deliverable: Project Charter
    - Project Charter complete
    - Stakeholders Register
    - Project Kickoff Meeting
    - Deliverable: Business Case
    - Initiation Phase complete
  - Planning
    - Deliverable: Project Schedule
    - Project Schedule complete
    - Deliverable: Project Management Plan
    - Project Management Plan complete
    - Deliverable: Requirements
    - Requirements complete
    - Deliverable: Build vs Leveraging Existing Tool Analysis & Decision
      - Build Analysis & ROM
      - Leveraging Existing Tool Analysis & ROM
      - Analysis & Decision
    - Decision complete
    - Planning based on Decision
      Complete the Planning Gate R&C Assessment
  - Execution
    - Project Development
      - Development Roadmap of Sprints
    - Project Development Completed
    - RA Mod Testing Phases
      - Integration Testing
    - Testing Phases Complete
    - Conduct Lessons Learned Meeting
  - Execution Phase complete
  - Monitoring and Controlling
  - Monitoring and Controlling Phase Complete
  - Project Closeout
  - Closeout Phase complete

III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

ID	% Complet	Task Name	Duration	Start	Finish	Predecessors	Actual Finish	S
1	59%	Adjudication Workflow Management System	239 days?	Tue 8/1/23	Fri 6/28/24		NA	
2	95%	Initiation	99 days?	Tue 8/1/23	Fri 12/15/23		NA	
3	100%	Risk and Complexity Assessment	2 days?	Tue 8/1/23	Wed 8/2/23		Wed 8/2/23	
4	100%	Complete Pre-Charter Risk&Complexity Assessment and determine Project Level	1 day	Tue 8/1/23	Tue 8/1/23		Tue 8/1/23	
5	100%	Complete Initiation Gate Risk&Complexity Assessment	1 day?	Wed 8/2/23	Wed 8/2/23	4	Wed 8/2/23	
6	100%	Deliverable: Project Charter	58 days?	Thu 8/24/23	Mon 11/13/23		Mon 11/13/23	
7	100%	Develop Project Charter	20 days?	Thu 8/24/23	Wed 9/20/23	4,12	Wed 9/20/23	
8	100%	Review/Update Project Charter	1 day?	Thu 9/21/23	Thu 9/21/23	7	Thu 9/21/23	
9	100%	Approve Project Charter	40 days?	Tue 9/19/23	Mon 11/13/23		Mon 11/13/23	
10	100%	Project Charter complete	0 days	Mon 12/4/23	Mon 12/4/23	9,23	Mon 12/4/23	
11	100%	Stakeholders Register	15 days?	Thu 8/3/23	Wed 8/23/23		Wed 8/23/23	
12	100%	Identify Project Stakeholders	15 days	Thu 8/3/23	Wed 8/23/23	5	Wed 8/23/23	
13	100%	Identify OCM Stakeholders	1 day?	Wed 8/16/23	Wed 8/16/23		Wed 8/16/23	
14	100%	Project Kickoff Meeting	4 days?	Wed 8/9/23	Mon 8/14/23		Mon 8/14/23	
15	100%	Prepare presentation	0 days	Wed 8/9/23	Wed 8/9/23		Wed 8/9/23	
16	100%	Schedule Kickoff meeting (1st Project Mtg/No Kickoff)	1 day?	Thu 8/10/23	Thu 8/10/23		Thu 8/10/23	
17	100%	Conduct Kickoff meeting	1 day?	Mon 8/14/23	Mon 8/14/23		Mon 8/14/23	
18	87%	Deliverable: Business Case	46 days	Fri 10/13/23	Fri 12/15/23		NA	
19	100%	Develop Business Case	27 days	Fri 10/13/23	Mon 11/20/23		Mon 11/20/23	
20	100%	Review/Update Business Case	5 days	Tue 11/21/23	Mon 11/27/23	19	Mon 11/27/23	
21	100%	Approve Business Case Round 1	5 days	Tue 11/28/23	Mon 12/4/23	20	Mon 12/4/23	



Page 1

IV. Project Spending Plan

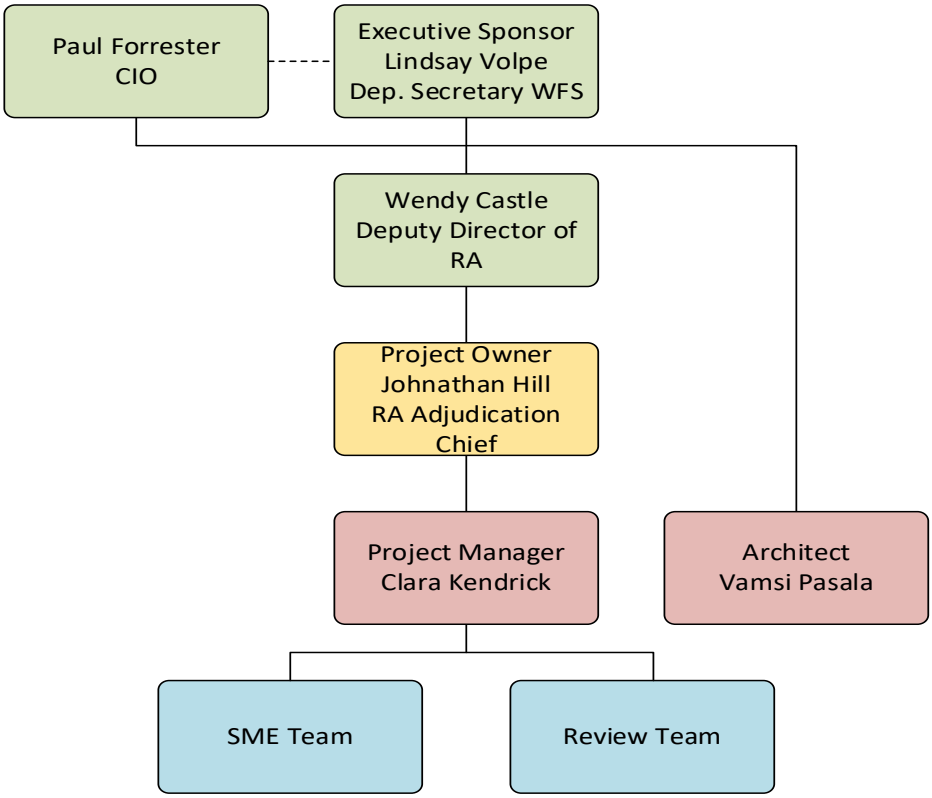
The breakdown of the expenditures is unknown. Using the total budget within software category at this time.

FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software:$*779,714.50*	*Software: $0.00*
Other OpEx (Vendor Deliverables): $0.00	*Other OpEx (Vendor Deliverables): $0.00*
Other CapEx: $0.00	*Other CapEx: 0.00*

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on business rules progress, and to answer general status questions. This meeting is also the forum for escalating issues that require all project stakeholders to resolve together.



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with the Reemployment Assistance program to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce policy.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction

Name	Project Role	Responsibility
		• Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Wendy Castle	Project Sponsor/Director Reemployment Assistance	• Provide guidance on overall strategic direction • Advising the Strategic Planning Office and project manager of risks that may impact the project • Facilitate resolution of significant issues in the project
Johnathan Hill	Project Owner	• Represents the interests of the stakeholders • Monitors project progress • Approves project definition • Approves plans and schedules • Validates project deliverables meet expectations • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
Clara Kendrick	Project Manager	• Manages all aspects of the project and ensure compliance with project plan • Monitors project progress and schedule adherence • Completes all documents related to the project • Identifies and manages risks according to the project plan
Vamsi Pasala	Architect and Technical Lead	• Responsible for assisting the team in finding solutions to issues elevated to him • Is available to project sponsors for technical questions regarding direction of the project

Name	Project Role	Responsibility
		and any dependencies/impacts of other projects • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager in evaluating change requests
Technical Team	Technical Support	• Process development tasks • Contributes technical expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Manager in accordance with the Risk and Issue Management section of the PMP • Assists the Project Manager in responding to risks and issues • Assists the Project Manager is evaluating change requests
Review Team	Documentation Reviewers	• Reviews documentation when submitted by Vendor • Contributes subject matter expertise • Completes assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with the Risk and Issue Management section of this PMP • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests

C. Project Management Methodology

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues.

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Program-wide Organizational Change Management Plan
- Organizational Change Readiness Assessment
- Change Impact Analysis
- Communications Plan

- Change Champion Network
- Training Plan
- Change Management Metrics
- Post-implementation Support Plan

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

This project capacity plan will be built with the vendor to determine the best way to measure capacity load of the ChatBot solution.

OPERATIONAL WORK PLAN
FOR
APPEALS WORKFLOW MANAGEMENT SYSTEM

FLORIDA DEPARTMENT OF COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023-2024
QUARTER 3

PREPARED ON FEBRUARY 1, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 4
G. KEY STAKEHOLDERS 4
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 5
III. RESOURCE LOADED PROJECT SCHEDULE 6
IV. PROJECT SPENDING PLAN 7
V. PROJECT ORGANIZATION AND METHODOLOGY 8
A. PROJECT ORGANIZATIONAL CHART 8
B. PROJECT ROLES AND RESPONSIBILITIES 8
C. PROJECT MANAGEMENT METHODOLOGY 10
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 11
VII. PROJECT RISK MANAGEMENT PLAN 11
VIII. CAPACITY PLAN 12

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

The Appeals Workflow Management System project is part of the Florida Department of Commerce's Continuous Modernization Program, hereafter referred to as "Continuous Mod."

In support of Continuous Mod, FloridaCommerce maintains the Reemployment Assistance Claims and Benefits Information System, commonly referred to as "Reconnect," hereafter referred to as "the System."

The System serves as the central repository to file, track, view, and process Reemployment Assistance claims. The System functions as the core benefits administration platform for FloridaCommerce staff, claimants, and employers and Third-Party Administrators (TPAs). The System provides online access to apply for benefits, view, and track claims, set up payment information, respond to fact-finding requests, and protest and appeal eligibility determinations.

For employers, the System allows access to respond to and protest inquiries regarding claimants receiving Reemployment Assistance benefits. The System also allows employers to grant TPAs access to perform specific administrative functions.

The current Appeals Workflow Management System (AWMS) supports a process facilitated by a collection of functions and features inside the System. Having been built over a decade ago, the System and the functions and features that comprise the AWMS need modernization.

A. Scope Statement

In Scope

- All appropriated, budgeted, and approved tasks necessary to implement the AWMS.
- Subsequent transition to application maintenance and support.
- New features, improvements to existing features, and fixes to non-working functionality comprise the project scope. Most of those items are already captured as Help Desk tickets in ServiceNow. A few others have already been established via information gather with appeals Subject Matter Experts (SMEs). The list of in-scope items is captured in the project charter and is not repeated here.

Out of Scope

- Any work that is not specifically listed as "in scope."
- Any work that is not appropriated, budgeted, and approved.

B. Project Objectives and Business Benefits

Project Objective	Business Benefit
Improvements to the existing Appeals Workflow Management System	1. Streamlined appeals workflow for both claimants and FloridaCommerce Appeals SMEs. 2. Increases in SME efficiency and the improved Appeals processing times that would result. 3. Better customer service.

C. Critical Success Factors

The work to improve the existing AWMS will be performed by in-house software developers and testers, all of whom have expertise in working with the System. The Appeals SMEs – those who use the System every day in executing the job of the Appeals team – will guide development of the improvements and will review and approve the result. In both cases (developers/testers and SMEs), resource allocation will be critical to the success of the project. Resources are shared across multiple projects, so maintaining an accurate project schedule, accurately forecasting resource requirements, and accurately forecasting dates and durations is critical to correctly allocating resources.

D. Key Dates

Key Dates (anticipated)	Importance and Relevance to the Project
12/5/2023	Initiation Phase Ends
02/15/2024	Planning Phase Ends
12/18/2023	Execution Phase Starts
6/28/2024	Project Ends

E. Major Deliverables

8/25/2023	Deliverable 1: Project Kick-Off Meeting
12/5/2023	Deliverable 2: Project Management Plan & Transition Plan
9/29/2023	Deliverable 3: Project Schedule
6/30/2024	Deliverable 4: Go Live

F. Major Milestones

Major Milestone	Milestone Description
Procurement Phase Complete	Completed
Initiation Phase Complete	Completed
Planning Phase Complete	In progress
Execution Phase Complete	In progress
Monitor and Controlling Phase Complete	In progress
Closing Phase Complete	Not started

G. Key Stakeholders

Key Stakeholders	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Domenic DiLullo	Chief Technology Officer / Work Group
Paul Forrester	Chief Information Officer / Work Group
Tisha Womack	Chief Financial Officer / Work Group
Lindsay Volpe	Deputy Secretary, Division of Workforce Services / Work Group

Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Jamie Dattoli	Project Owner
TBD	Modernization Program Manager – Strategic Planning Office
Thomas Hoverman	Organizational Change Management Lead
Nicholas Kaoudis	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

- FloridaCommerce will provide resources capable of completing the required analysis, development, testing, and review tasks at the highest quality. Those resources must be dedicated to the tasks at a level that enables them to complete those tasks at the schedule deadlines.

Project Constraints

- Human resources are finite and, due to the complexity of the System, cannot be replaced with equivalent expertise in the time required.
- End date of 6/30/2024 cannot be moved.

II. Work Breakdown Structure

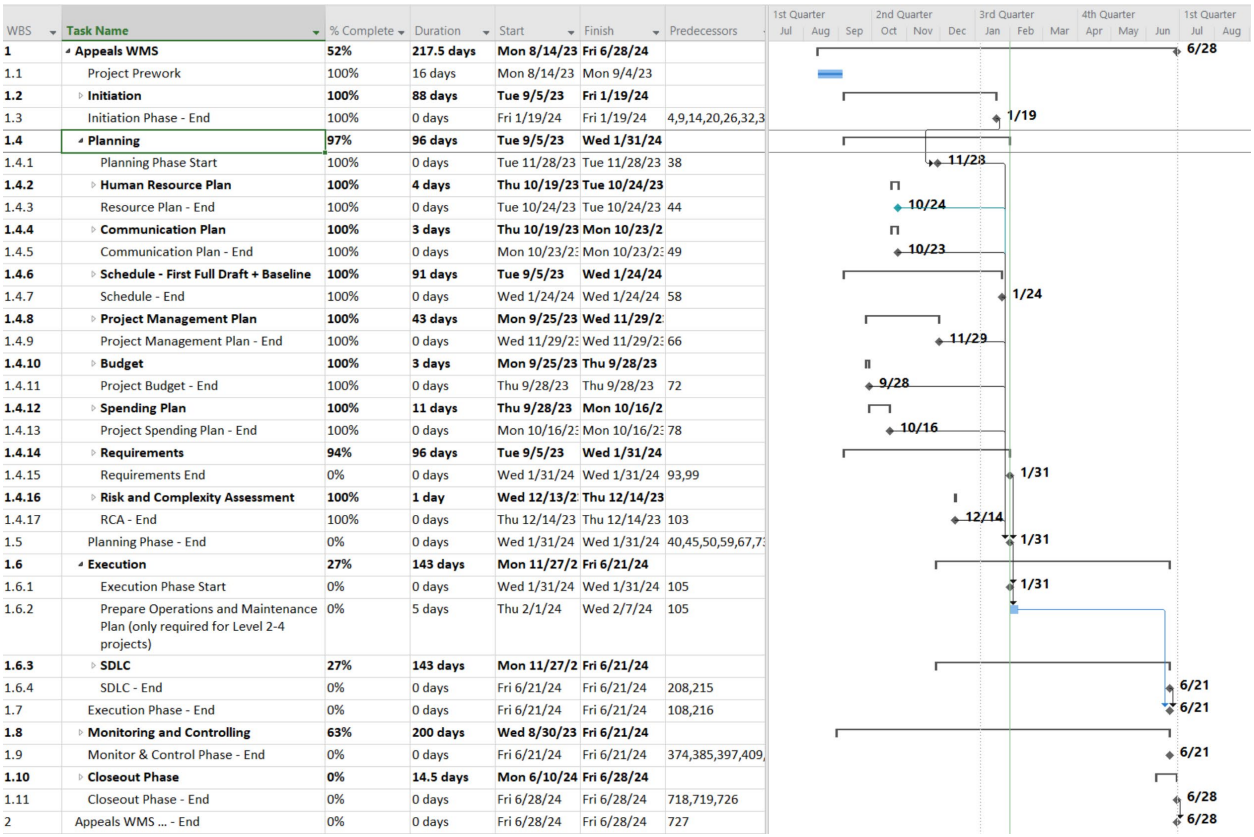
The work breakdown structure defines the overall layout of the project to improve the existing AWMS.

WBS	Task Name
1	**Appeals WMS**
1.1	Project Prework
1.2	**Initiation**
1.3	Initiation Phase - End
1.4	**Planning**
1.4.1	Planning Phase Start
1.4.2	**Human Resource Plan**
1.4.3	Resource Plan - End
1.4.4	**Communication Plan**
1.4.5	Communication Plan - End
1.4.6	**Schedule - First Full Draft + Baseline**
1.4.7	Schedule - End
1.4.8	**Project Management Plan**
1.4.9	Project Management Plan - End
1.4.10	**Budget**
1.4.11	Project Budget - End
1.4.12	**Spending Plan**
1.4.13	Project Spending Plan - End

1.4.14	**Requirements**
1.4.15	Requirements End
1.4.16	**Risk and Complexity Assessment**
1.4.17	RCA - End
1.5	Planning Phase - End
1.6	**Execution**
1.6.1	Execution Phase Start
1.6.2	Prepare Operations and Maintenance Plan (only required for Level 2-4 projects)
1.6.3	**SDLC**
1.6.4	SDLC - End
1.7	Execution Phase - End
1.8	**Monitoring and Controlling**
1.9	Monitor & Control Phase - End
1.1	**Closeout Phase**
1.11	Closeout Phase - End
2	Appeals WMS … - End

III. Resource Loaded Project Schedule

The project schedule indicates the planned timetable for all project-related work and estimates the appropriate staffing levels necessary to accomplish each task, to produce each deliverable, and to achieve each milestone.



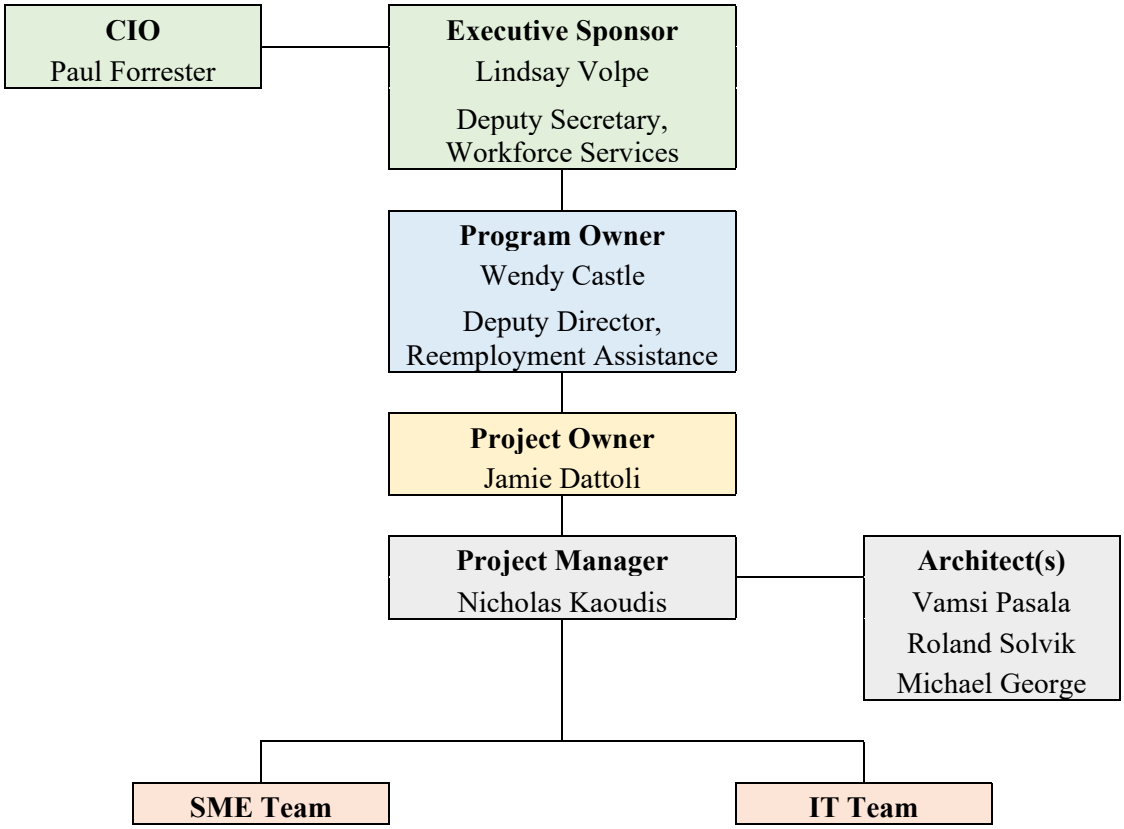
WBS	Task Name	% Complete	Duration	Start	Finish	Predecessors
1	**Appeals WMS**	**52%**	**217.5 days**	**Mon 8/14/23**	**Fri 6/28/24**	
1.1	Project Prework	100%	16 days	Mon 8/14/23	Mon 9/4/23	
1.2	**Initiation**	**100%**	**88 days**	**Tue 9/5/23**	**Fri 1/19/24**	
1.3	Initiation Phase - End	100%	0 days	Fri 1/19/24	Fri 1/19/24	4,9,14,20,26,32,3
1.4	**Planning**	**97%**	**96 days**	**Tue 9/5/23**	**Wed 1/31/24**	
1.4.1	Planning Phase Start	100%	0 days	Tue 11/28/23	Tue 11/28/23	38
1.4.2	**Human Resource Plan**	**100%**	**4 days**	**Thu 10/19/23**	**Tue 10/24/23**	
1.4.3	Resource Plan - End	100%	0 days	Tue 10/24/23	Tue 10/24/23	44
1.4.4	**Communication Plan**	**100%**	**3 days**	**Thu 10/19/23**	**Mon 10/23/2**	
1.4.5	Communication Plan - End	100%	0 days	Mon 10/23/23	Mon 10/23/23	49
1.4.6	**Schedule - First Full Draft + Baseline**	**100%**	**91 days**	**Tue 9/5/23**	**Wed 1/24/24**	
1.4.7	Schedule - End	100%	0 days	Wed 1/24/24	Wed 1/24/24	58
1.4.8	**Project Management Plan**	**100%**	**43 days**	**Mon 9/25/23**	**Wed 11/29/2**	
1.4.9	Project Management Plan - End	100%	0 days	Wed 11/29/23	Wed 11/29/23	66
1.4.10	**Budget**	**100%**	**3 days**	**Mon 9/25/23**	**Thu 9/28/23**	
1.4.11	Project Budget - End	100%	0 days	Thu 9/28/23	Thu 9/28/23	72
1.4.12	**Spending Plan**	**100%**	**11 days**	**Thu 9/28/23**	**Mon 10/16/2**	
1.4.13	Project Spending Plan - End	100%	0 days	Mon 10/16/23	Mon 10/16/23	78
1.4.14	**Requirements**	**94%**	**96 days**	**Tue 9/5/23**	**Wed 1/31/24**	
1.4.15	Requirements End	0%	0 days	Wed 1/31/24	Wed 1/31/24	93,99
1.4.16	**Risk and Complexity Assessment**	**100%**	**1 day**	**Wed 12/13/2**	**Thu 12/14/23**	
1.4.17	RCA - End	100%	0 days	Thu 12/14/23	Thu 12/14/23	103
1.5	Planning Phase - End	0%	0 days	Wed 1/31/24	Wed 1/31/24	40,45,50,59,67,7
1.6	**Execution**	**27%**	**143 days**	**Mon 11/27/2**	**Fri 6/21/24**	
1.6.1	Execution Phase Start	0%	0 days	Wed 1/31/24	Wed 1/31/24	105
1.6.2	Prepare Operations and Maintenance Plan (only required for Level 2-4 projects)	0%	5 days	Thu 2/1/24	Wed 2/7/24	105
1.6.3	**SDLC**	**27%**	**143 days**	**Mon 11/27/2**	**Fri 6/21/24**	
1.6.4	SDLC - End	0%	0 days	Fri 6/21/24	Fri 6/21/24	208,215
1.7	Execution Phase - End	0%	0 days	Fri 6/21/24	Fri 6/21/24	108,216
1.8	**Monitoring and Controlling**	**63%**	**200 days**	**Wed 8/30/23**	**Fri 6/21/24**	
1.9	Monitor & Control Phase - End	0%	0 days	Fri 6/21/24	Fri 6/21/24	374,385,397,409,
1.10	**Closeout Phase**	**0%**	**14.5 days**	**Mon 6/10/24**	**Fri 6/28/24**	
1.11	Closeout Phase - End	0%	0 days	Fri 6/28/24	Fri 6/28/24	718,719,726
2	Appeals WMS ... - End	0%	0 days	Fri 6/28/24	Fri 6/28/24	727

IV. Project Spending Plan

FY 2023-24 Expenditures
Software: $0.00
Other OpEx (Vendor Deliverables): $779,714.50
Other CapEx: 0.00

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor / Work Group	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Domenic DiLullo	CTO / Work Group	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project.

Name	Project Role	Responsibility
		• Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Paul Forrester	CIO / Work Group	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Tisha Womack	CFO / Work Group	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Wendy Castle	Chief of RA	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Jamie Dattoli	Project Owner / Chief, RA Appeals	• Contributes subject matter expertise. • Assists the Project Managers in responding to risks and issues. • Assists the Project Manager in evaluating change requests. • Reviews deliverables and project documents, identifying any deficiencies. • Reviews and approves deliverables. • Reviews and approves RFCs.
Nicholas Kaoudis	Project Manager	• Manages all aspects of the project and ensures compliance with project plan.

Name	Project Role	Responsibility
		• Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan. • Manages vendor deliverables and schedule adherence.
SME Team	Subject Matter Expert(s)	• Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule • Identifies risks and issues to the Project Managers in accordance with Risk and Issue Management as described in the Project Management Plan • Assists the Project Managers in responding to risks and issues • Assists the Project Manager in evaluating change requests

C. Project Management Methodology

FloridaCommerce uses a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management includes the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors, if engaged:
    - will respond to inquiries or requests from FloridaCommerce within one business day from receipt;
    - will provide an estimate, in the case where additional time is needed for a task, which must be approved by the FloridaCommerce Project Manager;
    - will provide final copies of all reports in electronic format for archive purposes, at the end of the contract.

- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project intends to improve the delivery, execution, security, or convenience of FloridaCommerce's lines of business through the implementation of modern processes and tools based on industry best practices and frameworks.

The project team aims to maximize communication, engagement, adoption, and performance of these new processes, roles, and responsibilities through a combination of tools, templates, and techniques such as:

- Stakeholder identification and engagement plans
- Process identification and improvement plans
- Educational assessment and training plans
- Change risk assessment
- Change Advocate networks
- Change Management
- Business Relationship Management
- IT Service Management

VII. Project Risk Management Plan

See the Risk and Complexity Assessment that accompanies the Initiation phase documents for this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
Hurricane impacting the state delays the schedule	Low	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff	PM

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
			throughout engagement to increase adoption rate and ensure a successful transition	
Insufficient knowledge transfer of new process	Medium	Medium	Involve impacted staff throughout engagement to increase participation and knowledge of new processes	PM
Identified technical solutions do not address requirements	Low	Medium	Procure necessary solution(s)	SME/ Implementation Teams, Owner
Procurement(s) are outside of available budget.	Low	Medium	Identify alternative solutions, seek additional funding. As of this writing, procurement is not expected. This risk would therefore be not applicable.	SME Team, Owner
Resource requirements for execution of roadmap are beyond original expectations.	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME

VIII. Capacity Plan

Utilization of a single tool for software development provides a single source of truth for work tracking and resource allocation which can then be utilized for capacity planning for the development environment, tools, and developers.

Project Capacity Planning

- Establish Cross-Functional Team: To collaborate and communicate about production capacity and resource management, you want a cross-functional team with different levels and different functions.
- Calculate Resource Capacity: Before you can create a production capacity plan, you need to have an idea of your current capacity and your available resources.
- Determine Resource Requirements: For each project, look at the scope and what resources are required to do the task for the project.
- Prioritize Projects: Which projects are most important, and which can be put aside for the time being? You can't do everything at once.
- Allocate Resources Based on Project Priority: Now allocate those prioritized projects and make sure that they are aligned with the goals of the organization.
- Keep the Lines of Communications Open: Communicate between executives, project management leaders and stakeholders.
- Document Known Risks: Monitor risks such as weather, government regulations that stop a project or create new ones unexpectedly.
- Plan for How to Handle Too Much Capacity: Understand where it is and how to resolve it (such as reassigning), or not enough capacity (again, where/how).

OPERATIONAL WORK PLAN
FOR
DOCUMENT IMAGING SYSTEM

FLORIDA DEPARTMENT OF COMMERCE
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES

FISCAL YEAR 2023-2024
QUARTER 3

PREPARED ON JANUARY 30, 2024

TABLE OF CONTENTS

SECTION 1 — OVERALL PROJECT PLAN 3

I. PROJECT CHARTER 3
A. SCOPE STATEMENT 3
B. PROJECT OBJECTIVES AND BUSINESS BENEFITS 3
C. CRITICAL SUCCESS FACTORS 4
D. KEY DATES 4
E. MAJOR DELIVERABLES 4
F. MAJOR MILESTONES 4
G. KEY STAKEHOLDERS 5
H. SIGNIFICANT PROJECT ASSUMPTIONS AND CONSTRAINTS 5
II. WORK BREAKDOWN STRUCTURE 5
III. RESOURCE LOADED PROJECT SCHEDULE 7
IV. PROJECT SPENDING PLAN 8
V. PROJECT ORGANIZATION AND METHODOLOGY 8
A. PROJECT ORGANIZATIONAL CHART 8
B. PROJECT ROLES AND RESPONSIBILITIES 9
C. PROJECT MANAGEMENT METHODOLOGY 11
VI. BUSINESS PROCESS ORGANIZATIONAL CHANGE MANAGEMENT PLAN 11
VII. PROJECT RISK MANAGEMENT PLAN 12
VIII. CAPACITY PLAN 12

SECTION 1 — OVERALL PROJECT PLAN

I. Project Charter

FloridaCommerce is looking to modernize the central intake physical mail process for the Reemployment Assistance program using a document management system that has API call functionality that could allow calls from Reconnect and its subcomponents to pull data from the cloud-based central intake document repository.

The document management system must have the ability to process the barcodes that are generated by Reconnect so that documents can be automatically linked to the document ID (bar code) associated with claimants, ingested, and so that Reemployment Assistance program staff can make decisions timely and accurately.

A. Scope Statement

The goal of this project is to streamline the process for central intake using a document management system that can process and read the documents upon ingestion and automatically categorize them based on the document type using the identifiers on the document using optical character recognition.

In Scope

- Procure necessary services and/or products to implement the automated and modernized central intake physical mail process.

Out of Scope

- Modernization of other ingestion workflows.

B. Project Objectives and Business Benefits

Reconnect generates thousands of correspondences and distributes correspondence based on the communications preference selected by each claimant. Reconnect defaults correspondence to physical mail if the claimant does not opt to receive electronic mail as their preference. Documents are handled in the Reemployment Assistance Central Intake Unit in two scenarios.

1. Scenario 1:

   The Reemployment Assistance program requests additional information from claimants and employers to process benefits applications timely and accurately. There is no mandate to submit the documents in a specific way, and documents are submitted either electronically or physically. The central intake process is initiated when physical mail from the claimant or employer is received by the Central Intake Unit.

2. Scenario 2:

   Mail sent by FloridaCommerce is returned due to a bad address or a change of address. Returned mail is also scanned and indexed to the appropriate claimant or employer file.

Current challenges associated with the central intake process cause delays across the Reemployment Assistance program and impact its ability to process reemployment assistance benefits timely and accurately.

C. Critical Success Factors

The following factors are being used as measurement for success:

- Scanners are installed and used to process physical mail.
- Scanners can read barcodes and associate mail with claimants in Reconnect.

D. Key Dates

Key Date	Importance and Relevance to the Project
August 15, 2023	Project Kick Off Meeting
October 20, 2023	Project Charter Approved
October 27, 2023	Requirements Approved
November 22, 2023	RFQ Created
December 8, 2023	Vendor Response
December 15, 2023	Request for Information Process Completed
December 28th, 2023	Procurement of Vendor Completed
January 8, 2024	Project Kick-off with vendor
February 15, 2024	Design Complete
February 16, 2024	Infrastructure in place
February 29, 2024	Base Install Completed

E. Major Deliverables

This project is made up of multiple major deliverables and paths:

1. Procure necessary services and products to implement the automated and modernized central intake physical mail process.

Major Deliverable	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce
Technical Design Document	Vendor and FloridaCommerce create the technical design document for the solution
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the technical and process related business requirements.
Project Closeout Report	The PM provides the Project Closeout Report

F. Major Milestones

Major Milestone	Deliverable Description
Project Kickoff Meeting	The PM schedules the project kickoff meeting and provides agenda and materials.
Project Management Plan	The PM provides the final version of the PMP after review and approval by FloridaCommerce.
Technical Design Document	Vendor and FloridaCommerce create the technical design document for the solution

Major Milestone	Deliverable Description
Business Rules Traceability Matrix	The BA and PM conduct a series of work sessions to drill down in detail the data mapping that can be used to drive the document imaging system processes and requirements.
Project Closeout Report	The PM provides the Project Closeout Report

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer
Tisha Womack	Chief Financial Officer
Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
El Lise Bethel	RA Modernization Acting Project Owner
Karmyn Hill	RA Modernization Acting Project Owner
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
David Sinclair	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. This project will include a procurement for products and/or services.
2. Any modifications to existing records management policies and procedures or record retention rules will be handled outside the scope of the project by Reemployment Assistance and FloridaCommerce's Office of the General Counsel.
3. The assigned IT resources possess relevant knowledge and skills to complete the identified tasks.
4. Members of the project team will have access to the necessary tools, hardware, and materials necessary to complete the identified tasks.
5. All relevant stakeholders will attend required status meetings. However, there may be instances where some stakeholders are unavailable to attend.
6. The project sponsor will be responsive and prepared to make decisions regarding the project cost and scope.

Project Constraints

1. Staff availability to engage in the project throughout the lifecycle could be a risk.
2. Scanning capability to integrate with the scanning software.

II. Work Breakdown Structure

The Work Breakdown Structure (WBS) below represents the high-level deliverables for the project, from inception (Initiation) to completion (Project Closeout). To avoid duplication, the lower-level work packages are represented with their due dates in Section D. Key Dates.

WBS	Task Name
1	**FloridaCommerce-Document Imaging System**

WBS	Task Name
1.1	**Initiation**
1.1.1	**Risk and Complexity Assessment**
1.1.2	**PM Deliverable: Project Charter**
1.1.3	**Project Charter complete**
1.1.4	**Stakeholders Register**
1.1.5	**Project Kickoff Meeting**
1.1.6	**Conduct Lessons Learned Meeting**
1.2	**Initiation Phase complete**
1.3	**Planning**
1.3.1	**PM Deliverable: Resource Plan**
1.3.2	**Resource Plan Complete**
1.3.3	**PM Deliverable: Project Schedule**
1.3.4	**Project Schedule complete**
1.3.5	**PM Deliverable: Project Management Plan**
1.3.6	**Project Management Plan complete**
1.3.7	**PM Deliverable: Project Budget**
1.3.8	**Project Budget complete**
1.3.9	**PM Deliverable: Project Spending Plan**
1.3.10	**MILESTONE: Project Spending Plan complete**
1.3.11	Complete Impact Analysis
1.3.12	**Requirements:**
1.3.13	Complete the Planning Gate R&C Assessment
1.3.14	**Conduct Lessons Learned Meeting**
1.4	**MILESTONE: Planning Phase complete**
1.5	**Execution**
1.5.1	Review RFQ
1.5.2	Approve RFQ
1.5.3	Purchasing Review and Adjustments
1.5.4	**Record Level Detail Requirements Gathering Completed**
1.5.5	**Phase I: RFI Solution Evaluations**
1.5.6	**Conduct Lessons Learned Meeting**
1.5.7	**Transition to Operations**
1.6	**Execution Phase complete**
1.7	**Monitoring and Controlling**
1.7.1	Manage Project Schedule
1.7.2	Manage Project Costs
1.7.3	Manage Project Scope
1.7.4	Manage Project Risks
1.7.5	Manage Project Issues

WBS	Task Name
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity
1.7.9	Conduct Regularly scheduled Status Meetings
1.7.10	Prepare Regularly scheduled Status Reports
1.8	**Monitoring and Controlling Phase Complete**
1.9	**Project Closeout**
1.9.1	**PM Deliverable: Project Closeout Report**
1.9.2	**Project Closeout Report complete**
1.9.3	**Conduct Lessons Learned Meeting**
1.1	**Closeout Phase complete**

III. Resource Loaded Project Schedule

As stated in Section II, Work Breakdown Structure, since this is a high-level representation of the project, the project team names are not reflected. The names are listed in Section V.B. Project Roles and Responsibilities, Project Team.

The project management deliverables mentioned below are required by Florida Administrative Code, Rule 60GG.

WBS	Task Name	% Complete	Duration	Start	Finish
1	**22 FloridaCommerce-Document Imaging System**	**5%**	**325 days**	**Tues 8/01/23**	**Fri 6/28/24**
1.1	**Initiation**	**90%**	**45 days**	**Tues 8/1/23**	**Tue 9/26/23**
1.1.1	**Risk and Complexity Assessment**	**100%**	**1 days**	**Mon 8/15/23**	**Mon 8/15/23**
1.1.2	**PM Deliverable: Project Charter**	**90%**	**20 days**	**Mon 8/15/23**	**Tue 10/20/23**
1.1.3	**Project Charter complete**	90%	1 days	**Tue 10/20/23**	**Fri 1/17/23**
1.1.4	**Stakeholders Register**	**100%**	**1 day**	**Mon 8/22/23**	**Mon 8/22/23**
1.1.5	**Project Internal Kickoff Meeting**	**100%**	**1day**	**Mon 8/15/23**	**Mon 8/15/23**
1.1.6	**Conduct Lessons Learned Meeting**	**100 %**	**2 days**	**Mon 9/25/23**	**Tue 9/26/23**
1.2	**Initiation Phase complete**	100%	0 days	Fri 9/29/23	Fri 10/20/23
1.3	**Planning**	**0%**	**120 days**	**9/29/23**	**Mon 1/22/24**
1.3.1	**RFQ Conducted**	**100%**	**35 days**	**Fri 11/3/23**	**Fri 12/28/23**
1.3.2	**Resource Plan Complete**	100%	5 days	Fri 12/20/23	Fri 12/28/23
1.3.3	**PM Deliverable: Project Schedule**	**20%**	**11 days**	**Mon 12/28/23**	**Fri 1/15/24**

WBS	Task Name	% Complete	Duration	Start	Finish
1.3.4	**Project Schedule complete**	20%	0 days	Mon 1/15/24	Mon 1/15/24
1.3.5	**PM Deliverable: Project Management Plan**	**100%**	**59 days**	Mon 1/8/24	Mon 1/8/24
1.3.6	**Project Management Plan complete**	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.7	**PM Deliverable: Project Budget**	**100%**	**13 days**	Mon 1/8/24	Mon 1/8/24
1.3.8	**Project Budget complete**	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.9	**PM Deliverable: Project Spending Plan**	**100%**	**3 days**	Mon 1/8/24	Mon 1/8/24
1.3.10	**MILESTONE: Project Spending Plan complete**	100%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.11	Complete Security Assessment Analysis	75%	1 day	Mon 1/8/24	Mon 1/8/24
1.3.12	**Requirements:**	**50%**	**116 days**	Mon 9/18/23	Mon 1/22/24
1.3.13	Complete the Planning Gate R&C Assessment	90%	1 day	Mon 1/8/24	Mon 1/8/24
1.3.14	**Conduct Lessons Learned Meeting**	**0**	**2 days**	Thus 1/11/24	Thus 1/11/24
1.4	**MILESTONE: Planning Phase complete**	0	0 days	Fri 1/12/24	Mon 1/22/24
1.5	**Execution**	**0**	**156 days**	**Mon 1/15/24**	**Fri 6/28/24**

IV. Project Spending Plan

The Document Imaging System project has existing resources assigned, therefore, there is no current spend for this project. Expenditures are anticipated once a procurement is complete and a contract for products and/or services is executed.

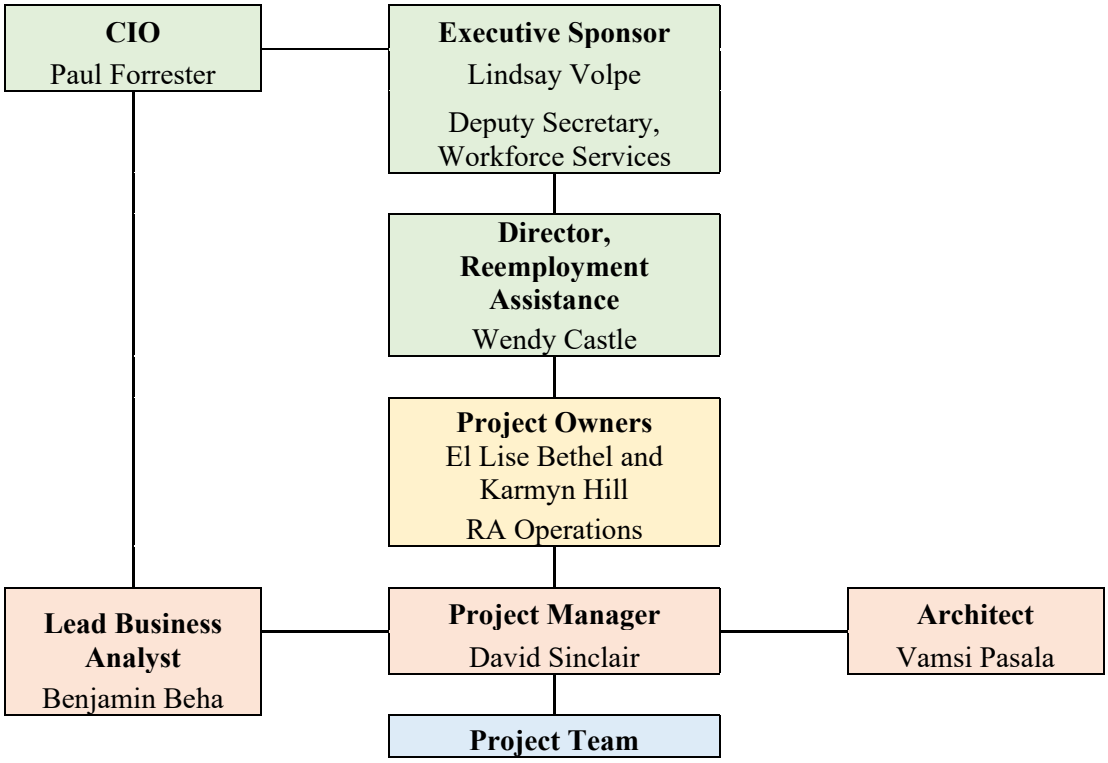
FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: $0.00	*Software: $0.00*
Other OpEx (Vendor Deliverables): $0.00	*Other OpEx (Vendor Deliverables): $0.00*
Other CapEx: $0.00	*Other CapEx: $0.00*

V. Project Organization and Methodology

A. Project Organizational Chart

The Project Manager meets with project stakeholders every week on Request for Information, business rules progress, and to answer general status questions. This meeting is also the forum

for escalating issues that require all project stakeholders to resolve together.



B. Project Roles and Responsibilities

The staff mentioned below are instrumental in facilitating the needs of the team so that the project outcome meets expectations.

The project sponsors also work with their direct reports if the team has issues that require elevation.

The Legal and Records Management Liaison works directly with Reemployment Assistance to provide guidance when record series requests may differ from what is allowed legally or by FloridaCommerce Policy.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project • Reviewing and signing off on key milestones
Paul Forrester	Project Sponsor/Chief Information Officer (CIO)	• Responsible for the Strategy of FloridaCommerce IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations

Name	Project Role	Responsibility
		• Responsible for working closely with programs on technology needs
Wendy Castle	Project Sponsor/Director of Reemployment Assistance	• Provide guidance on overall strategic direction. • Advising the Strategic Planning Office and project manager of risks that may impact the project. • Facilitate resolution of significant issues in the project
El Lise Bethel and Karmyn Hill	Project Owner's	• Represents the interests of the stakeholders to the DW Team • Monitors project progress. • Approves project definition. • Approves plans and schedules. • Validates project deliverables meet expectations. • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
David Sinclair	Project Manager	• Manages all aspects of the project and ensure compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project. • Identifies and manages risks according to the project plan
Vamsi Pasala	Architect and Technical Lead	• Responsible for assisting the team(s) in coordinating the most appropriate solution for Document Imaging • Assists the team with identifying integration points with other projects and evaluating any risks. • Is available to executive management, the program team, and the project team for technical questions regarding direction of the project and any dependencies/impacts of other projects. • Assists the PM in coordinating additional technical resources/SMEs, if necessary, for the team. • Has historical knowledge of the Connect system since Go Live
Benjamin Beha	Business Analyst	• Responsible for assisting the Enterprise Solution Architect in coordinating the most appropriate solution. • Is available to executive management, the program team, and the project team for technical questions regarding direction of the project.

Name	Project Role	Responsibility
		• Assists the PM in coordinating additional technical resources/SMEs, if necessary, for the team. • Has years of historical knowledge of the Connect system

C. Project Management Methodology

The path to archiving and purging data requires transparency, excellent communication, and an overall process that supports both.

FloridaCommerce will use a project management methodology in compliance with project management standard rule 60GG-1 F.A.C., project requirements and department experience with similar engagements. Predictability, accountability, and flexibility are key elements that must be embraced by the overall project management approach to ensure FloridaCommerce's satisfaction and project success. Successful project management must include active and visible leadership, multiple controls and checkpoints with measurable outcomes, and engagement with all stakeholders. FloridaCommerce believes strong project management is critical throughout the life of any successful project.

For this project, FloridaCommerce's project management will include the following specific elements, in addition to our standard methodology:

- The project management team will advise leadership on areas of concern and will propose solutions to mitigate risk.
- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
- In the case where additional time is needed for a task, vendors will provide an estimate, which must be approved by the FloridaCommerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- FloridaCommerce's project management approach will utilize the technical skills, tools, and techniques needed to succeed, as well as the dedication to accountability, resource commitment, and organizational focus. Project success will be the result of active communication among all individuals, understanding everyone's role in the project, and clear delineation of responsibilities.

FloridaCommerce believes successful project management hinges on the following:

- Clearly established project goals and requirements
- Ongoing assessment of quality against established standards
- Constant measurement of success against established deliverables and milestones
- Personal presence and commitment of key project leadership
- Proactive identification and communication of risks and issues

VI. Business Process Organizational Change Management Plan

This project will need Organizational Change Management since the project is taking back scanning of physical mail from a third-party vendor back to FloridaCommerce staff.

VII. Project Risk Management Plan

Currently there are no new risks for this project.

Project risks can be raised by anyone on the project. These risks are then entered into the department's tool where they are discussed during weekly meetings. They are tracked in these meetings until the risk is closed.

Risk meetings, hosted by program management, are attended by sponsors and stakeholders of this project.

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1.				
2.				
3.				
4.				
5.				

VIII. Capacity Plan

This project will look at the capacity of mail to determine the number of scanners that would be needed to keep up with the capacity.

REEMPLOYMENT ASSISTANCE SYSTEM MODERNIZATION
Projected Spend Plan Summary SFY23-24
AS OF 1/31/2024

EXPENDITURE SUMMARY BY APPROPRIATION CATEGORY

100270 - UCMNT & UCMOD

FY 2023 - 2024

Category	Appropriation	Grant		July	August	September	October	November	December	January	February	March	April	May	June	Total
100270	$ 3,504,402.00	UCMNT	PROJECTED	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 284,585.68	$ 65,054.90	$ 65,054.90	$ 65,054.90	$ 65,054.90	**$ 544,805.26**
			ACTUAL	$ 558,920.00	$ (376,649.40)	$ 563,676.98	$ -	$ -	$ 475,078.74	$ 100,461.07		$ -	$ -	$ -	$ -	**$ 1,321,487.39**
Release	$ 2,628,297.00	UCMOD	PROJECTED	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**
			ACTUAL	$ 420,793.49	$ (105,080.82)	$ 82,698.88	$ 22,994.41	$ 413,097.28	$ (6,551.14)	$ (349,501.57)		$ -	$ -	$ -	$ -	**$ 478,450.53**
			ACTUAL TOTAL	**$ 979,713.49**	**$ (481,730.22)**	**$ 646,375.86**	**$ 22,994.41**	**$ 413,097.28**	**$ 468,527.60**	**$ (249,040.50)**	$ -	$ -	$ -	$ -	$ -	**$ 1,799,937.92**
		Appropriation Balance		$ 2,524,688.51	$ 3,006,418.73	$ 2,360,042.87	$ 2,337,048.46	$ 1,923,951.18	$ 1,455,423.58	$ 1,704,464.08	$ 1,704,464.08	$ 1,704,464.08	$ 1,704,464.08	$ 1,704,464.08	$ 1,704,464.08	
		Release Balance		$ 1,648,583.51	$ 2,130,313.73	$ 1,483,937.87	$ 1,460,943.46	$ 1,047,846.18	$ 579,318.58	$ 828,359.08	$ 828,359.08	$ 828,359.08	$ 828,359.08	$ 828,359.08	$ 828,359.08	

100778 - UCMNT & UCMOD

Category	Appropriation	Grant		July	August	September	October	November	December	January	February	March	April	May	June	Total
100778	$ 16,066,221.00	UCMNT	PROJECTED	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 858,668.93	$ 1,206,427.62	$ 1,206,427.62	$ 1,206,427.62	$ 1,206,607.62	**$ 5,684,559.40**
			ACTUAL	$ -	$ 629,681.65	$ -	$ 62,338.50	$ 31,476.75	$ 825,295.48	$ 867,578.82		$ -	$ -	$ -	$ -	**$ 2,416,371.20**
Release	$ 12,049,646.00	UCMOD	PROJECTED	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**
			ACTUAL	$ -	$ 775,223.98	$ -	$ -	$ -	$ (775,223.98)	$ -	$ -	$ -	$ -	$ -	$ -	**$ -**
			ACTUAL TOTAL	**$ -**	**$ 1,404,905.63**	**$ -**	**$ 62,338.50**	**$ 31,476.75**	**$ 50,071.50**	**$ 867,578.82**	$ -	$ -	$ -	$ -	$ -	**$ 2,416,371.20**
		Appropriation Balance		$ 16,066,221.00	$ 14,661,315.37	$ 14,661,315.37	$ 14,598,976.87	$ 14,567,500.12	$ 14,517,428.62	$ 13,649,849.80	$ 13,649,849.80	$ 13,649,849.80	$ 13,649,849.80	$ 13,649,849.80	$ 13,649,849.80	
		Release Balance		$ 12,049,646.00	$ 10,644,740.37	$ 10,644,740.37	$ 10,582,401.87	$ 10,550,925.12	$ 10,500,853.62	$ 9,633,274.80	$ 9,633,274.80	$ 9,633,274.80	$ 9,633,274.80	$ 9,633,274.80	$ 9,633,274.80	

105174 - FRR21

Category	Appropriation	Grant		July	August	September	October	November	December	January	February	March	April	May	June	Total
105174	$ 42,010,971.00	FRR21	PROJECTED	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 1,429,243.20	$ 4,153,794.38	$ 4,153,794.38	$ 4,153,794.38	$ 4,154,476.80	**$ 18,045,103.13**
			ACTUAL	$ 315,607.00	$ 2,440,616.01	$ 2,512,031.99	$ 805,507.77	$ 286,158.34	$ 1,392,771.03	$ 1,554,455.83		$ -	$ -	$ -	$ -	**$ 9,307,147.97**
Release	$ 17,883,478.00	Appropriation Balance		$ 41,695,364.00	$ 39,254,747.99	$ 36,742,716.00	$ 35,937,208.23	$ 35,651,049.89	$ 34,258,278.86	$ 32,703,823.03	$ 32,703,823.03	$ 32,703,823.03	$ 32,703,823.03	$ 32,703,823.03	$ 32,703,823.03	
		Release Balance		$ 17,567,871.00	$ 15,127,254.99	$ 12,615,223.00	$ 11,809,715.23	$ 11,523,556.89	$ 10,130,785.86	$ 8,576,330.03	$ 8,576,330.03	$ 8,576,330.03	$ 8,576,330.03	$ 8,576,330.03	$ 8,576,330.03	

GRANT UCMNT
CATEGORIE 100778, 100270

								July		August		September		October		November		December		January		Feburary		March		April		May		June		TOTAL FY23 EXP	PO Balance
PO	Contract #	Category	Start Date	End Date	Vendor	Description	Total Contract Cost	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual		
C003CF	C3347	100778	7/1/22	6/30/23	Vitaver - UCMOD	FY 22/23 - Vitaver - IT STAFF AUG PROJECT M	32,688.00												32,688.00														32,688.00	-
C004C7	C3393	100778	7/1/22	6/30/23	Vcarve - UCMOD	FY 22/23 - VCARVE - IT STAFF AUG QUALITY EN	12,672.00												12,672.00														12,672.00	-
C00A12	C3311	100778	7/1/22	6/30/23	Gejits Infotech Inc. - UCMOD	FY22/23 - Gejits infotech - Business Analyst, A	29,216.00												29,216.00														29,216.00	-
C00AF7	C3408	100778	7/1/22	6/30/23	Randstad - UCMOD	FY 22-23 - Randstad - IT Staff Aug - Applicatio	50,625.60												50,625.60														50,625.60	-
C00B1F	C3387	100778	7/1/22	6/30/23	Creative Consulting	FY 22-23 IT STAFF AUG SYSTEMS ADMINISTRA	32,520.00					28,160.00													1,090.00		1,090.00		1,090.00		1,090.00		28,160.00	4,360.00
C00BF5	C3396	100270	7/1/22	6/30/23	GEIITS INFOTECH	FY 22-23 - IT STAFF AUG QUALITY ASSURANCE	54,259.88	5,573.48		11,535.08															9,287.83		9,287.83		9,287.83		9,287.83		17,108.56	37,151.32
C00D80	C3479	100270	7/1/22	6/30/23	IMMIXTECHNOLOGY,	FY 22-23 - ImmixTechnology - Pega Services	224,903.88	337,824.02		(217,166.85)		104,246.71																					224,903.88	-
C00D80	C3479	100778	7/1/22	6/30/23	IMMIXTECHNOLOGY,	FY 22-23 - ImmixTechnology - Pega Services	337,824.02			337,824.02																							337,824.02	-
C0154E	C3433	100778	7/1/22	6/30/23	Randstad - UCMOD	FY 22-23 - RANDSTAD TECHNOLOGIES - IT STA	15,984.00												15,984.00														15,984.00	-
C01564	C3394	100270	7/1/22	7/30/23	KYRA SOLUTIONS,	FY22-23 - Kyra Solutions - IT Staff Aug Systems	18,032.00	18,032.00																									18,032.00	-
C01564	C3394	100778	7/1/22	7/30/23	KYRA SOLUTIONS,	FY22-23 - Kyra Solutions - IT Staff Aug Systems	17,248.00			17,248.00																									17,248.00	-
C01823	C3477	100270	7/1/22	6/30/23	SHI - Microsoft	FY22/23 - SHI - Microsoft Azure Cloud Service	283,844.01					205,864.81													19,494.80		19,494.80		19,494.80		19,494.80		205,864.81	77,979.20
C01EF8	C3388	100778	7/1/22	6/30/23	Strategic IT Alignment	FY 22-23 - Strategic It Alingment group -IT STA	32,220.00			32,040.00																					180.00		32,040.00	180.00
C01EF9	C3392	100778	7/1/22	6/30/23	Vcarve	FY 22/23 VCARVE - STAFF AUG QUALITY ENGI	42,732.00			25,344.00															4,347.00		4,347.00		4,347.00		4,347.00		25,344.00	17,388.00
C01EFB	C3438	100778	7/1/22	6/30/23	Vitaver - UCMOD	FY 22-23 - Vitaver - IT STAFF AUG APPLICATIO	33,600.00												33,600.00														33,600.00	-
C0211A	C3441	100778	7/1/22	6/30/23	V2Soft - UCMOD	FY 22-23 - V2Soft - IT STAFF AUG - QUALITY A	23,925.20												23,925.20														23,925.20	-
C027ED	C3453	100778	7/1/22	6/30/23	3K Technologies - UCMOD	FY 22-23 - 3K TECHNOLOGIES - IT STAFF AUG	13,200.00												13,200.00														13,200.00	-
C0307E	C3466	100778	7/1/22	6/30/23	Tal Search Group - UCMOD	FY 22-23 - TAL SEARCH - IT STAFF AUG - SECUI	20,437.50												20,437.50														20,437.50	-
C06C6C	C3509	100270	8/9/22	6/30/23	TekBank Consultants	FY 22-23 IT Staff Aug - Applications Developm	39,480.00					18,048.00													5,358.00		5,358.00		5,358.00		5,358.00		18,048.00	21,432.00
C06CB9	C3508	100270	7/1/22	6/30/23	SCONY	FY 22-23 IT Staff Aug - Applications Developm	59,142.89					15,605.92													10,884.24		10,884.24		10,884.24		10,884.24		15,605.92	43,536.97
C06F41	C3510	100270	7/1/22	6/30/23	SGS TECHNOLOGIE	FY 22-23 IT Staff Aug- SGS Technologie -Applic	46,800.00					39,510.00													1,822.50		1,822.50		1,822.50		1,822.50		39,510.00	7,290.00
C06F46	C3507	100778	8/15/22	6/30/23	3K Technologies - UCMOD	FY 22-23 - 3k Technologies - IT Staff Aug - Bus	28,160.00												28,160.00														28,160.00	-
C085B0	C3506	100778	10/1/22	6/30/23	Tal Search Group - UCMOD	FY 22-23 - Tal Search - IT Staff Aug - Project M	19,530.00												19,530.00														19,530.00	-
C0B09F	C3476	100270	7/1/22	6/30/23	SHI - Microsoft	FY 22/23 - SHI Microsoft Azure Cloud Services	32,264.64					11,882.91									5,956.19				3,606.39		3,606.39		3,606.39		3,606.39		17,839.10	14,425.54
C0C441	C3186	100270	10/21/22	6/30/23	Beacon	FY22/23 - BEACON SYSTEMS - Strategic Projec	186,566.63	189,065.63		(189,065.63)		186,566.63																					186,566.63	-
C0C441	C3186	100778	10/21/22	6/30/23	Beacon	FY22/23 - BEACON SYSTEMS - Strategic Projec	189,065.63			189,065.63																							189,065.63	-
C0EC90	C3604	100778	6/22/22	5/31/23	QUEUE-IT - UCMOD	FY 22/23 - QUEUE-IT - Enterprise Virtual Subs	83,568.00												83,568.00														83,568.00	-
C0F7CF	C3616	100778	7/1/22	6/30/23	NASWA - UDMOD	FY22/23 - NASWA - Consulting Services (RA M	5,400.00												5,400.00														5,400.00	-
C0F805	C3592	100778	12/2/22	6/30/23	Randstad - UCMOD	FY 22-23 - IT Staff Aug - Systems Administrato	27,639.68												27,639.68														27,639.68	-
C102F1	C3621	100778	12/19/22	6/30/23	GCOM Software LLC - UCMOD	FY 22-23 - GCOM - IT Staff Aug - Systems Adm	15,488.00												15,488.00														15,488.00	-
C13737	C3329	100270	1/17/23	3/31/23	Vitaver and Associates, Inc.	FY21-22- IT Staff Aug-Vitaver& Associates - FI	31,055.50																		7,763.88		7,763.88		7,763.88		7,763.88			31,055.50
C14E06	C3644	100270	2/28/23	2/28/24	OPEN TEXT INC.,	FY23-24 - Open Text- Blazon- Base Maintenan	8,424.87	8,424.87																									8,424.87	-
C15D22	C3641	100778	3/13/23	6/30/23	Optimum Software - UCMOD	FY 22/23 - Optimum Software - IT Staff Aug -	27,808.00												27,808.00														27,808.00	-
C15D2D	C3639	100778	3/23/23	6/30/23	ABTSOLUTIONS - UCMOD	FY 22/23 - Business Information Technology	33,480.00												33,480.00														33,480.00	-
C16E73	C3667	100778	3/13/23	6/30/23	Optimum Software - UCMOD	FY 22/23 - Optimum Software - IT Staff Aug -	13,904.00												13,904.00														13,904.00	-
C1E409	C3732	100778	7/1/23	6/30/24	Strategic IT Alignment Group,	FY 23/24 - Strategic IT Alignment Group - Tele	205,930.00							45,688.50		19,626.75		16,830.00	16,681.50		13,810.50		16,830.00		23,320.69		23,320.69		23,320.69		23,320.69		112,637.25	93,282.75
C1EFB0	PR291807	100270	7/1/23	6/30/2024	OpenText, Inc.	FY23-24 - Open Text	368,718.26												368,718.26														368,718.26	-
C20AC2	C3736	100778	7/1/23	6/30/24	Strategic IT Alignment Group,	FY 23/24 - Strategic IT Alignment Group - Mar	104,000.00							16,650.00		11,850.00			17,550.00		8,700.00		10,500.00		9,687.50		9,687.50		9,687.50				65,250.00	38,750.00
C23167	C2191	100270	7/1/23	6/30/24	Global Technology Solutions - FRR21	FY23/24 - GTS- RA IVR Enhancements (Genes	97,523.00												97,523.00														97,523.00	-
C23788	PR277001	100270	7/1/23	6/30/24	Sauce Labs	FY 23/24 - SauceLabs - Cross Browsing Testing	5,000.00												5,000.00														5,000.00	-
C261C2	PR319040	100270	8/1/23	5/30/24	SauceLabs	FY 23/24 - SauceLabs -testing different device	3,837.48												3,837.48														3,837.48	-
C2A803	C3696	100778	10/2/23	6/30/24	Gejits Infotech Inc	FY 23-24 - IT STAFF AUG ENTERPRISE APPLICA	135,000.00												15,840.00		12,960.00		12,960.00		23,310.00		23,310.00		23,310.00		23,310.00		41,760.00	93,240.00
C2CBDF	C3615	100778	11/30/23	6/30/24	Mythics, LLC	FY23/24 - Mythics - Oracle ULA Licensing and	1,132,704.63																		283,176.16		283,176.16		283,176.16		283,176.16		-	1,132,704.63
C2D55F	C3871	100778	11/1/23	6/30/24	Insight Public Sector	FY 23/24 - INSIGHT Microsoft Azure Cloud Ser	3,000,000.00																647,627.62		588,093.10		588,093.10		588,093.10		647,627.62	2,352,372.38
C2D560	C3871	100778	7/1/23	10/31/23	Insight Public Sector	FY 23/24 - INSIGHT Microsoft Azure Cloud Ser	1,000,000.00														15,081.98		734,921.67		62,499.09		62,499.09		62,499.09		62,499.09		750,003.65	249,996.35
C2D078	PR379924	100270	12/23/23	6/30/24	Insight Public Sector	FY23-24 - RA-MOD- Insight Public Sector- STR	44,548.88														44,548.88												-	-
C2EABD	PR366334	100778	12/14/23	12/14/2024	IBM	FY23-24 - IBM - CP4BA Subscription	410,046.84														410,046.84												-	-
C2ECC8	C2191-A1	100778	1/1/24	12/31/24	GTS	FY23/24 - GTS - RA IVR Enhancements (Genes	4,278,063.64																4,278,063.64										4,278,063.64	-
C2ED4A	PR395243	100270	1/9/23	12/8/24	SHI International	FY23-24 - SHI - Metadefender Software Licens	105,489.17																78,140.12		6,837.26				6,837.26		6,837.26		78,140.12	27,349.05
C2F87D	PR376909	100270	12/12/23	1/30/24	InQuest LLC	FY23-24 RA-MOD - InQuest- Joe Sandbox	49,956.00														49,956.00												-	-
C318F7	C3891/C3	100778	7/1/23	6/30/24	Insight Public Sector	FY 23/24 - MS Azure Cloud Services (Commer	900,000.00																56,383.64		210,904.09		210,904.09		210,904.09		210,904.09		56,383.64	843,616.36
EP2435	C3454	100778	7/1/22	6/30/23	Gartner	FY 22/23 - Gartner - IV&V (Year 2 of 2)	694,877.50												287,898.00		406,979.50												694,877.50	-
	PR422029	100270	2/1/24	1/31/25	CarahSoft Technology Corp.	FY23/24 - CARAHSOFT - Snowflake Maintenan	257,447.31																										-	257,447.31

GRANT FRR21
CATEGORY 105174 C1E9F7

| | | | | | | | FY2023 - 2024 | | | | | | |

GRANT UCMOD ** UCMOD SPENT ALL THE WAY OUT. NO FUTURE PROJECTIONS

CATEGORY 100270, 100778

								July		August		September		October		November		December		January		Feburary		March		April		May		June		TOTAL FY23 EXP	PO Balance
PO	Contract #	Category	Start Date	End Date	Vendor	Description	Total Contract Co	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual		
BAE498	C3257	100270			EY; ERNST & YOUN	FY22	-	-																									-	-
C000BF	C3443	100270	7/1/22	6/30/23	Tal Search Group	FY 22-23 - TAL SEA	19,257.00	19,257.00																									19,257.00	-
C003CF	C3347	100270	7/1/22	6/30/23	Vitaver	FY 22/23 - Vitaver	11,952.00			11,952.00																							11,952.00	-
C003CF	C3347	100778	7/1/22	6/30/23	Vitaver	FY 22/23 - Vitaver	-			32,688.00								(32,688.00)															-	-
C004C7	C3393	100270	7/1/22	6/30/23	Vcarve	FY 22-23 - VCARVE	12,672.00			12,672.00																							12,672.00	-
C004C7	C3393	100778	7/1/22	6/30/23	Vcarve	FY 22-23 - VCARVE	-			12,672.00								(12,672.00)															-	-
C2F87E	PR383089	105174	1/4/24	6/30/24	Insight Public Sector, Inc	FY23-24 - Insight P	56,990.88																										-	56,990.88
C0BB55	C3306	100270	4/1/22	8/31/22	Open Text Inc.	FY22/23 - OPEN T	6,161.50																										-	6,161.50
C0C441	C3186	100270	10/21/22	6/30/23	Beacon Systems, Inc	FY22/23 - BEACON	-																										-	-
C0332A	C2191	100270	7/1/22	6/30/23	Global Technology Solut	FY22/23 - GTS - IV	-																										-	-
C04B37	C2191	100270	7/1/22	10/15/22	Global Technology Solut	FY22/23 - GTS - RA	-																										-	-
C004C9	C3440	100270	7/1/22	6/30/23	Tal Search Group	FY 22-23 - Tal Sea	32,384.00	16,192.00				16,192.00																					32,384.00	-
C0062A	C3308	100270	7/1/22	6/30/23	Tal Search Group, Inc.	FY22-23 - Tal Sear	-																										-	-
C00670	C3326	100270	7/1/22	6/30/23	Gejits Infotech Inc	FY22/23 - Gejits -	-																										-	-
C00A12	C3311	100270	7/1/22	6/30/23	Gejits Infotech Inc.	FY22/23 - Gejits In	14,608.00			14,608.00																							14,608.00	-
C00A12	C3311	100778	7/1/22	6/30/23	Gejits Infotech Inc.	FY22/23 - Gejits In	-			29,216.00								(29,216.00)															-	-
C00AF7	C3408	100270	7/1/22	6/30/23	Randstad	FY 22-23 - Randsta	-	14,343.92		(14,343.92)																							-	-
C00AF7	C3408	100778	7/1/22	6/30/23	Randstad	FY 22-23 - Randsta	-			50,625.60								(50,625.60)															0.00	(0.00)
C0154E	C3433	100778	7/1/22	6/30/23	Randstad	FY 22-23 - RANDS	-			15,984.00								(15,984.00)															-	-
C01EFB	C3438	100778	7/1/22	6/30/23	Vitaver	FY 22-23 - Vitaver	-			33,600.00								(33,600.00)															-	-
C01EFE	C3439	100270	7/1/22	6/30/23	IT Trailblazers	FY 22-23 IT TRAILE	22,880.00			11,440.00		11,440.00																					22,880.00	-
C01F00	C3445	100270	7/1/22	6/30/23	Vitaver	FY 22-23 - VITAVE	29,920.00			29,920.00																							29,920.00	-
C0211A	C3441	100778	7/1/22	6/30/23	V2Soft	FY 22-23 - V2Soft	-			23,925.20								(23,925.20)															-	-
C02125	C3432	100270	7/1/22	6/30/23	RamcoTek	FY 22-23 RAMCOT	28,717.00	12,173.00				16,544.00																					28,717.00	-
C027ED	C3453	100270	7/1/22	6/30/23	3K Technologies	FY 22-23 - 3K TECI	25,350.00			13,350.00		12,000.00																					25,350.00	-
C027ED	C3453	100778	7/1/22	6/30/23	3K Technologies	FY 22-23 - 3K TECI	-			13,200.00								(13,200.00)															-	-
C0307E	C3466	100778	7/1/22	6/30/23	Tal Search Group	FY 22-23 - TAL SEA	-			20,437.50								(20,437.50)															-	-
C0697D	C3444	100270	7/1/22	6/30/23	Ardent	FY 22-23 - Ardent	29,920.00			29,920.00																							29,920.00	-
C06F46	C3507	100778	8/15/22	6/30/23	3K Technologies	FY 22-23 - 3k Tech	-			28,160.00								(28,160.00)															-	-
C07157	C3519	100270	8/15/22	6/30/23	Gejits Infotech Inc.	FY 22-23 - Gejits -	26,043.75			26,043.75																							26,043.75	-
C0742A	C3435	100270	10/1/23	6/30/23	Tal Search Group	FY 22-23 - Tal Sea	13,430.00			13,430.00																							13,430.00	-
C085B0	C3506	100778	10/1/22	6/30/23	Tal Search Group	FY 22-23 - Tal Sea	-			19,530.00								(19,530.00)															-	-
C08C6F	C3518	100270	11/1/22	6/30/23	Kyra Solutions	FY 22-23 - Kyra So	17,512.00			17,512.00																							17,512.00	-
C0C9C2	C3563	100270	10/24/22	6/30/23	Gejits Infotech Inc.	FY 22-23 Gejits - I	13,680.00							13,680.00																			13,680.00	-
C0D128	C3436	100270	10/24/22	6/30/23	Tal Search Group	FY 22-23 - Tal Sea	12,480.00	12,480.00																									12,480.00	-
C0EC90	C3604	100778	6/22/22	5/31/23	QUEUE-IT	FY 22/23 - QUEUE	-			83,568.00								(83,568.00)															-	-
C0F7CF	C3616	100778	7/1/22	6/30/23	NASWA	FY22/23 - NASWA	-			5,400.00								(5,400.00)															-	-
C0F7CF	C3616	100270	7/1/22	6/30/23	NASWA	FY22/23 - NASWA	5,400.00					5,400.00																					5,400.00	-
C0F805	C3592	100270	12/1/22	6/30/23	Randstad	FY 22-23 - IT Staff	5,091.52	13,092.48		(8,000.96)																							5,091.52	-
C0F805	C3592	100778	12/2/22	6/30/23	Randstad	FY 22-23 - IT Staff	-			27,639.68								(27,639.68)															-	-
C102F1	C3621	100270	12/19/22	6/30/23	GCOM	FY 22-23 - GCOM	7,744.00			7,744.00																							7,744.00	-
C102F1	C3621	100778	12/19/22	6/30/23	GCOM	FY 22-23 - GCOM	-			15,488.00								(15,488.00)															-	-
C15D22	C3641	100778	3/13/23	6/30/23	Optimum Software	FY 22/23 - Optimu	-			27,808.00								(27,808.00)															-	-
C15D2D	C3639	100270	3/23/23	6/30/23	ABTSOLUTIONS	FY 22/23 - Busines	-	16,380.00		(16,380.00)																							-	-
C15D2D	C3639	100778	3/23/23	6/30/23	ABTSOLUTIONS	FY 22/23 - Busines	-			33,480.00								(33,480.00)															-	-
C16E73	C3667	100270	3/13/23	6/30/23	Optimum Software	FY 22/23 - Optimu	13,904.00			13,904.00																							13,904.00	-
C16E73	C3667	100778	3/13/23	6/30/23	Optimum Software	FY 22/23 - Optimu	-			13,904.00								(13,904.00)															-	-
C16F0A	C3666	100270	3/20/23	6/30/23	KLC Consulting	FY 22/23 - KLC Co	31,680.00	15,840.00		15,840.00																							31,680.00	-
C2D07B	PR379924	100270	12/23/23	6/30/24	Insight Public Sector	FY23-24 - RA-MOS	-													50,913.00		(50,913.00)										-	-
EP2435	C3454	100270	7/1/22	6/30/23	Gartner	IT - FY 22/23 - Ga	-	287,898.00		(318,214.30)						406,979.50				(406,979.50)												(30,316.30)	30,316.30
EP2435	C3454	100778	7/1/22	6/30/23	Gartner	IT - FY 22/23 - Ga	-			287,898.00								(287,898.00)															-	-
N/A	N/A	100270			Risk Management Insura	RISK INSURANCE	0.00							179.89								(179.89)											0.00	-
N/A	N/A	100270			MISC Exp	EXPENSE	(0.00)			30.88				3.55				19.79				(54.22)											(0.00)	-
N/A	N/A	100270			INDIRECT	INDIRECT	11,272.29			9,471.64		6,570.93				6,117.78		(6,570.93)		6,564.93		(10,882.06)											11,272.29	-
N/A	N/A	100270			FLCOMMERCE CTO	99134	44,513.91			15,683.92		9,849.51				18,980.48																			44,513.91	-
N/A	N/A	100270			FLCOMMERCE CTO	99134	(0.00)	13,137.09		8,336.17		4,702.44		9,130.97		(18,980.48)						(16,326.19)													(0.00)	-