

#	Area	Project	Status
1.	Planning, Coordination, and Oversight	Strategic Planning Office (SPO)	In progress and on schedule.
2.		Oversight (IV&V)	In progress and on schedule.
3.		System and Software Integration (SSI)	In progress and on schedule. Integration testing of the CX/UX solution dependent on CX/UX contractor. See System and Software Integration Operational Work Plan.
4.	Software	Adjudication Workflow Management	In progress and on schedule. Initiation phase underway. See Adjudication Workflow Management Operational Work Plan.
5.		ChatBot	In progress and on schedule. Contract execution underway to finalize purchase of ChatBot technology. See ChatBot Operational Work Plan.
6.		Rules Catalog	In progress and on schedule. Project scope is defined, and 75% of all known business rules analyzed. See Rules Catalog Operational Work Plan.
7.		Appeals Workflow Management	In progress and on schedule. Appeals-related System enhancement tickets are being identified for implementation. See Appeals Workflow Management Operational Work Plan.
8.		Incremental CX/UX Mobile-Responsive Transformation	CX/UX in progress and behind schedule. Increased communication, transparency, and accountability remain the focus with the technology contractor, especially for a detailed project schedule and meeting deliverables timely. Communications contractors are on schedule; remaining deliverables dependent on CX/UX contractor. See CX/UX Operational Work Plan.
9.		Document Imaging System	In progress and behind schedule. Vendor demonstrations ongoing. See Document Imaging System Operational Work Plan.
10.	Data and Analytics	Reporting	In progress and on schedule. 17% of in-scope reports have been completed or retired. See Reporting Operational Work Plan.
11.		Product and Data Management	In progress and on schedule. Project scope is being finalized. 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.
 - The contractor continued preparing test cases to support integration testing; additional test cases are expected to be identified once the CX/UX contractor finalizes its development work. Integration testing of the mobile-responsive user interface is currently blocked and will commence once the CX/UX contractor completes their development and System testing activities.
 - The contractor has initiated daily testing progress reports to measure the CX/UX contractor's progress and monitor their test results. As of the writing of this report, 93% of test cases have been executed with a 92% pass rate.
- [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, business requirements were defined, the project charter was completed, and the Project Management Plan was drafted.
- [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.
 - The Department finalized its decision about the technology that will be used to implement the ChatBot feature and is working with the Department of Management Services to execute a contract for this technology.
- [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.
 - Out of the 12,591 business rules that govern the Reemployment Assistance program, the relative complexity for 2,794 rules was analyzed in September, bringing the total number of analyzed rules to 9,487.
- [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.
 - Approximately half of the Appeals-related tickets have been reviewed and flagged for prioritization.
- [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.
 - Timely deliverable submission and deliverable quality remain a concern with the mobile-responsive user interface contractor, and the interface did not go-live on July 1, 2023, as originally planned. The Department continues to meet daily with both the prime and subcontractor to increase accountability and provide specific feedback about aligning the deliverables with the contract. The Department has also required greater communication from the contractor about its progress on completing product development, and the progress

they are making in both identifying and resolving defects. The prime and subcontractor are focusing their design and development on the initial Reemployment Assistance claims application only, as the application for Disaster Unemployment Assistance will require additional development that was not originally accounted for by the prime and subcontractor.

- The mobile-responsive user interface contractor has provided an updated schedule, which forecasted approximately 18 additional months of work would be needed to launch the mobile-responsive user interface as originally planned. The contractor estimated the potential launch of the product would be delayed to February 2024 rather than September 2023, which would include approximately one-sixth of the functionality required in the contract.
- [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.
 - The Department is evaluating technology options that best suit the project's goals, including leveraging and building off of an existing technology that is used to scan and index documents received by the Department via mail or fax.
 - Two vendor demonstrations were provided this reporting period.
- [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, 21 are complete, 46 are being developed and tested, 43 will be retired, and 289 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.
 - The project kick-off was held, and additional planning documents are on hold while the Department refines the project scope and incremental implementation of master data management for all Reemployment Assistance data elements, repositories, and use cases.

Procurement Status

N/A



OPERATIONAL WORK PLAN FOR CHATBOT

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

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10/06/2023

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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
October 9, 2023	Project Kick off with Vendor or RFQ Created

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	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
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, Department of Commerce

Key Stakeholder	Project Interest
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
Mark Miller	RA Modernization Acting Project Owner
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernizations IT Program Manager - IT
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

WBS	Task Name
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
1.7.9	Conduct Regularly scheduled Status Meetings
1.7.10	Prepare Regularly scheduled Status Reports
1.8	Monitoring and Controlling Phase Complete

WBS	Task Name
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	0		TBD	TBD

IV. Project Spending Plan

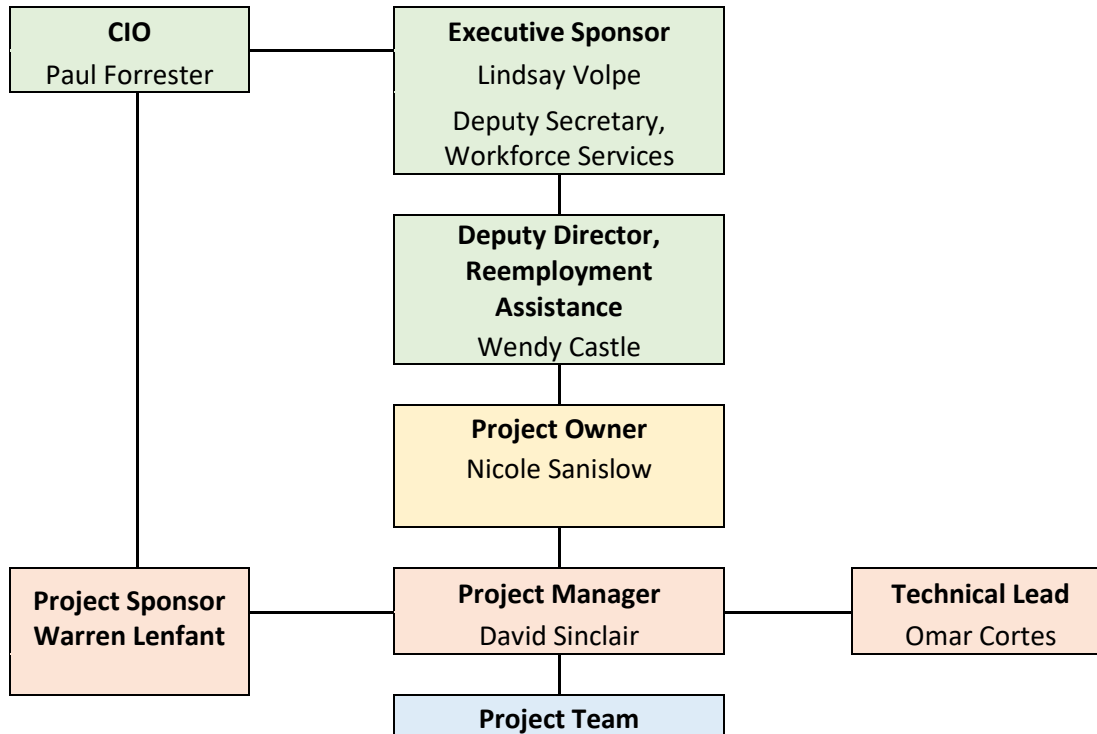
The ChatBot project has existing resources assigned, therefore, there is no spend for this project.

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	<ul style="list-style-type: none"> Provide guidance on overall strategic direction

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
Mark Miller	Project Owner/Chief of RA Operations	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Responsible for assisting the team(s) in coordinating the most appropriate solution

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team. • Has historical knowledge of the Contact Center for Reconnect
Warren Lenfant	Business Sponsor	<ul style="list-style-type: none"> • 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

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

**FISCAL YEAR 2023-2024
QUARTER 1**

PREPARED ON OCTOBER 9, 2023

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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 (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 prepare FloridaCommerce 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	<ul style="list-style-type: none"> • FloridaCommerce will have a complete catalog of System business rules.

C. **Critical Success Factors**

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

D. Key Dates

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
April 2024	Finalize and approve Catalog
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, Florida Department of Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer, Program Owner- Information Technology
Tisha Womack	Chief Financial Officer
Wendy Castle	Continuous Modernization Program Owner – Business
Nicole Sanislow	Continuous Modernization Program Manager – Business

Tom Richardson	Continuous Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	Continuous Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Continuous Modernization Program Manager – Information Technology
Nicholas Lent	Project Owner
Nicole Cain	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

WBS	Task Name
1	Rules Engine
1.1	Initiation
1.1.1	Risk and Complexity Assessment
1.1.2	Deliverable: Project Charter
1.1.3	Project Charter complete
1.1.4	Initiation Phase complete
1.2	Planning
1.2.1	Deliverable: Resource Plan
1.2.2	Resource Plan Complete
1.2.3	Deliverable: Project Schedule
1.2.4	Project Schedule complete
1.2.5	Deliverable: Project Management Plan
1.2.6	Project Management Plan complete
1.2.12	Planning Phase Complete
1.2.13	Requirements
1.3	Execution
1.3.1	Determine Subsets of Rules
1.3.2	Document Rules
1.3.3	Develop Rule Catalog
1.3.4	Conduct Lessons Learned Meeting

1.3.5	Execution Phase complete
1.4	Monitoring and Controlling
1.5	Project Closeout
1.5.1	Schedule Project Closeout Meeting
1.5.2	Deliverable: Project Closeout Report
1.5.3	Project Closeout Report complete
1.5.4	Conduct Knowledge Transfer
1.5.5	Conduct Project Closeout meeting
1.5.6	Conduct Lessons Learned Meeting
1.5.7	Closeout Phase complete

III. Resource Loaded Project Schedule

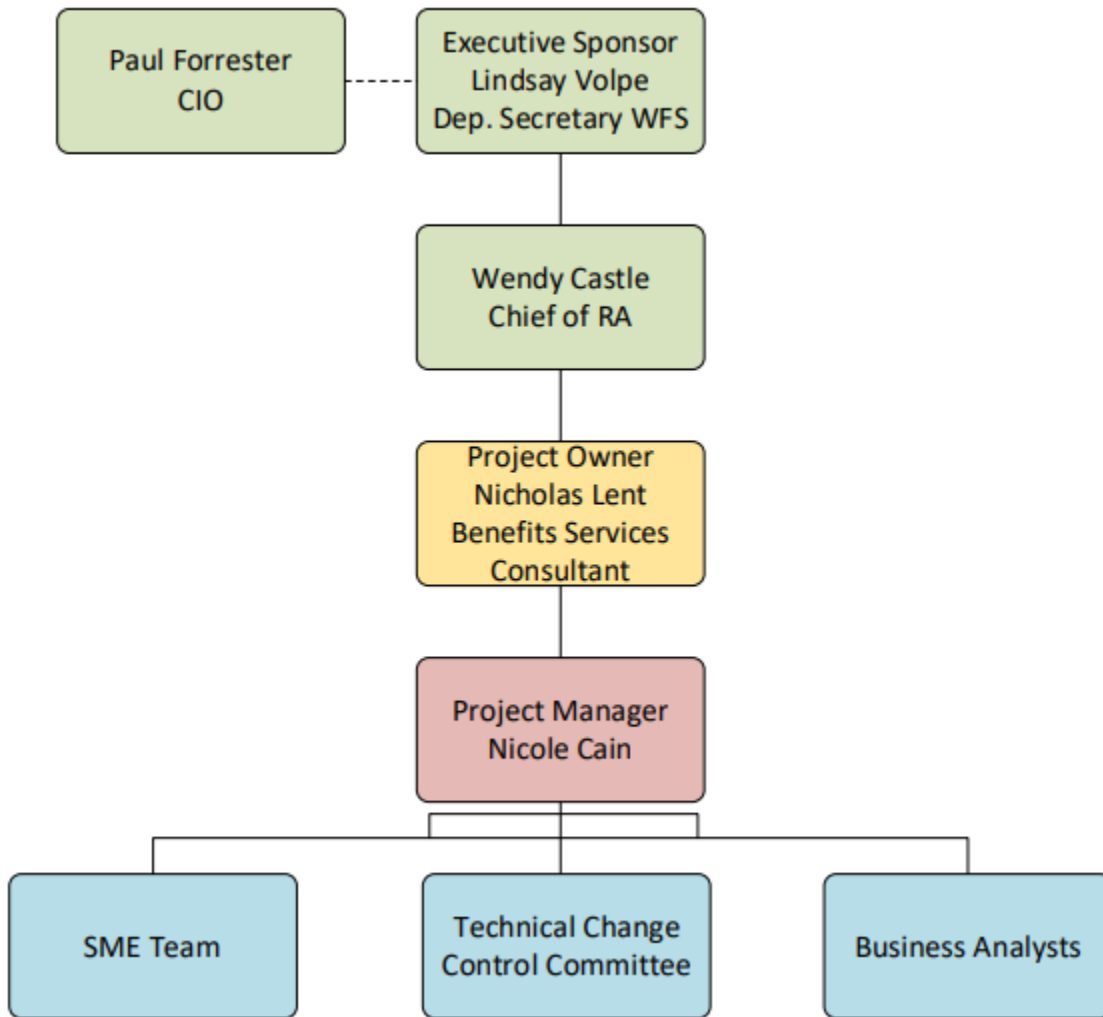
The Resource Loaded Project Schedule is currently being finalized. Once it is approved, it will be incorporated into this OWP.

IV. Project Spending Plan

FY 2023-24 Expenditures	FY 2024-25 Expenditures
<i>Software: \$0.00</i>	<i>Software: \$0.00</i>
<i>Other OpEx: \$0.00</i>	<i>Other OpEx: \$0.00</i>
<i>Other CapEx: \$0.00</i>	<i>Other CapEx: 0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 Services Consultant	<ul style="list-style-type: none"> • 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
Nicole Cain	Project Manager	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • Process development tasks • Contributes subject matter expertise • Complete assigned project tasks in accordance with the Project Schedule

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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.
- 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

This project will follow the Program Risk Management Plan captured within the Continuous Modernization Program Management Plan. The Continuous Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

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

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 INTEGRATION

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

**FISCAL YEAR 2023-2024
QUARTER 1**

PREPARED ON -10/02/2023

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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, FloridaCommerce 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 FloridaCommerce 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 Modernization program.

Out of Scope

- Business Process Optimization of Services
- Unit testing of individual projects

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

- 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 FloridaCommerce operations and minimization of demands on FloridaCommerce 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

Key Delivery Date	Importance and Relevance to the Project
07/01/2023	Project Kick-Off Meeting
10/02/2023	Design Documentation
9/15/2023	Infrastructure Performance Requirements
9/28/2023	Performance Benchmarks
06/30/2024	Oversight and Monitoring of RA Projects
06/30/2024	Integration Testing
06/30/2024	Integration Services
06/30/2024	Testing Team
06/30/2024	Project Closure

E. Major Deliverables

Major Deliverable	Deliverable Description	Status
Deliverable 7	Design Documentation	In Progress
Deliverable 8	Infrastructure Performance Requirements	Delivered
Deliverable 11	Performance Benchmarks	In Progress
Deliverable 13	Oversight and Monitoring of RA Projects	In Progress
Deliverable 14	Integration Testing	Not Started
Deliverable 15	Integration Services	In Progress
Deliverable 20	Testing Team	In Progress

F. Major Milestones

Major Milestone	Milestone Description
Initiation Phase Complete	All initiation activities completed
Planning Phase Complete	All planning activities completed

Major Milestone	Milestone Description
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

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, FloridaCommerce
Lindsay Volpe	Deputy Secretary, Division of 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
Tom Richardson	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Mark Miller	Bureau of RA Operations, Project Owner
Ernie Sanders	Peraton Account Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

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

Design may be materially constrained by:

1. Governing provisions of federal or state laws and regulations
2. Requirement to reduce operating costs
3. A schedule constraint of June 2023

II. Work Breakdown Structure

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
1.5	Program Delivery Complete
1.6	Project Close and Transition to FloridaCommerce
1.6.1	Mutually Agreed on Transition Date
1.6.2	Execute Transition
1.7	Program Closed

III. Resource Loaded Project Schedule

ID	WBS	Task Name	Duration	Start	Finish	Predecessors	Successors	Resource Names
1	1	Modernization Program	176 days?	Mon 7/3/23	Tue 3/12/24			
2	1.1	Program start	1 day	Mon 7/3/23	Mon 7/3/23		54,44,45,46,	
3	1.2	Contract Amendment #4 - Approval	18 days	Mon 7/31/23	Wed 8/23/23	2	22,14,126FS	
4	1.3	Program Deliverables	128 days?	Mon 7/3/23	Thu 1/4/24			
5	1.3.1	Deliverable 7 - Design Documentation	63.5 days	Mon 7/3/23	Mon 10/2/23			
13	1.3.2	Deliverable 8 - Infrastructure Performance Requirements	53 days	Mon 7/3/23	Fri 9/15/23			
20	1.3.3	Deliverable 11 - Performance Benchmarks	62 days	Mon 7/3/23	Thu 9/28/23			
31	1.3.4	Deliverable 13 - Oversight and Monitoring of Modernization Project	95 days	Wed 7/5/23	Thu 11/16/23			
47	1.3.5	Deliverable 14 - Integration Testing	93 days	Mon 7/3/23	Mon 11/13/23			
86	1.3.6	Deliverable 15 - Production Readiness Checklist	59 days	Mon 7/3/23	Mon 9/25/23			
101	1.3.7	Deliverable 20 - User Acceptance Testing	114 days	Wed 7/5/23	Fri 12/15/23			
124	1.4	Program Delivery Complete	0 days	Fri 12/15/23	Fri 12/15/23	12,19,30,48,85,100	152	
125	1.5	Project Close and Transition to DEO	27 days	Wed 1/17/24	Thu 2/22/24			
126	1.5.1	Mutually Agreed on Transition Date	0 days	Wed 2/14/24	Wed 2/14/24	3FS+6 mos	128FS-21 da SI,DEO	
127	1.5.2	Execute Transition	27 days	Wed 1/17/24	Thu 2/22/24			
152	1.6	Program Closed	0 days	Fri 2/23/24	Fri 2/23/24	151,124		

Project: https://peratongovt.sha Date: Fri 9/22/23	<table border="0"> <tr> <td>Task</td> <td></td> <td>Inactive Summary</td> <td></td> <td>External Tasks</td> <td></td> </tr> <tr> <td>Split</td> <td></td> <td>Manual Task</td> <td></td> <td>External Milestone</td> <td></td> </tr> <tr> <td>Milestone</td> <td></td> <td>Duration-only</td> <td></td> <td>Deadline</td> <td></td> </tr> <tr> <td>Summary</td> <td></td> <td>Manual Summary Rollup</td> <td></td> <td>Progress</td> <td></td> </tr> <tr> <td>Project Summary</td> <td></td> <td>Manual Summary</td> <td></td> <td>Manual Progress</td> <td></td> </tr> <tr> <td>Inactive Task</td> <td></td> <td>Start-only</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Inactive Milestone</td> <td></td> <td>Finish-only</td> <td></td> <td></td> <td></td> </tr> </table>	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			
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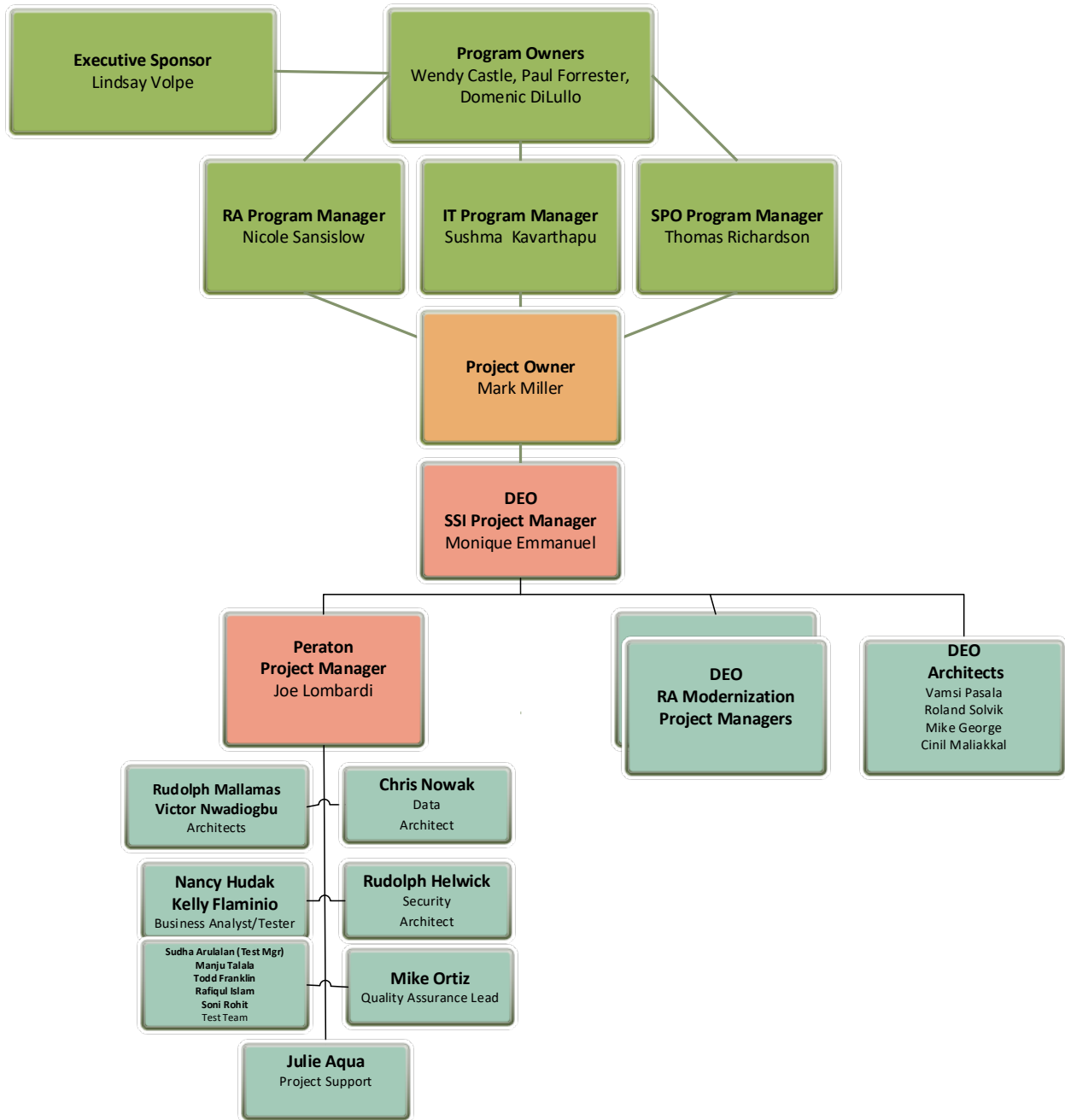
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IV. Project Spending Plan

FY 2021-22 Expenditures	FY 2022-23 Expenditures	FY 2023-24 Expenditures
Software: \$0	Software: \$0	Software: \$0
OpEx: \$33,737.60	OpEx: \$4,519,107.31	OpEx: \$2,370,122

V. Project Organization and Methodology

A. Project Organizational Chart



B. Project Roles and Responsibilities

Project Role	Resource Name	Responsibilities
Executive Sponsor	Lindsay Volpe	- Provides resources and support for the program to enable its success
Program Owners	Wendy Castle Paul Forrester Domenic DiLullo	- Provide guidance on overall strategic direction - Advise the Strategic Planning Office and project manager of risks that may impact the project - Facilitate resolution of significant issues in the project
Program Managers	Sushma Kavarthapu Thomas Richardson Nicole Sanislow	- Provide guidance on overall strategic direction - Advise the Strategic Planning Office and project manager of risks that may impact the project - Facilitate resolution of significant issues in the project - Review and sign off on key milestones
Project Manager	Monique Emmanuel	- Manage all aspects of the project and ensure compliance with PMP - Monitor project progress and schedule adherence - Complete all documents related to the project - Identify and manage risks according to the PMP
Project Owner	Mark Miller	- Review deliverables and project documents, identifying any deficiencies - Review and approve deliverables - Review and approve RFCs

<p>Florida Commerce Enterprise Architects</p>	<p>Vamsi Pasala Roland Solvik Mike George Cinil Maliak</p>	<ul style="list-style-type: none"> - Contribute subject matter expertise - Complete assigned project tasks in accordance with the Project Schedule - 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
<p>SSI Delivery Team Lead</p>	<p>Joe Lombardi</p>	<ul style="list-style-type: none"> - 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.
<p>Solutions Architect</p>	<p>Rudolph Mallamas</p>	<ul style="list-style-type: none"> - Responsible for providing senior level expertise on decision recommendations and priorities regarding the Department’s overall modernization initiative’s architecture.

	Victor Nwadiogbu	<ul style="list-style-type: none"> - Facilitates the establishment and implementation of standards and guidelines 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.
Data Architect	Chris Nowak	<ul style="list-style-type: none"> - 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 implementation.
Business Analyst & Tester	Nancy Hudak Kelly	<ul style="list-style-type: none"> - 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

	Flaminio	<p>drive the analysis and design of quality technical solutions.</p> <ul style="list-style-type: none"> - 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.
Transition & Quality Manager	Mike Ortiz	<ul style="list-style-type: none"> - 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. - 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.
Security Architect	Rudolph Helwick	<ul style="list-style-type: none"> - Manages the development and delivery of security standards, best practices, architecture, and systems to ensure information system security across the program.

		<ul style="list-style-type: none"> - 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.
Program Integration Testers	Sudha Arulalan, Jonathan T. Franklin, Rafiqul Islam, Manjula Tulala, Soni Rohit	<ul style="list-style-type: none"> - 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 project teams, and conducts program level regression testing.
Project Support	Julia Aqua	<ul style="list-style-type: none"> - Assist SSI Delivery Team Lead with meeting agendas and minutes. - Provide project schedule updates
RA Modernization Project Managers	Nicole Cain Nicholas Kaoudis James Sparks David Sinclair Linda Lawler Christian Stephens Patrick Day	<ul style="list-style-type: none"> - Contribute subject matter expertise - Complete assigned project tasks in accordance with the Project Schedule - Identify risks and issues to the Project Manager in accordance with the Risk and Issue Management section of this OWP - Assist the Project Manager in responding to risks and issues - Assist the Project Manager in evaluating change requests

	Clara Kendrick	
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B. Project Management Methodology

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For this project, Florida Commerce’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 Florida Commerce 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 Florida Commerce Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- Florida Commerce’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.

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- Training Plan
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Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner

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- 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)**

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

**FISCAL YEAR 2023-2024
QUARTER 1
PREPARED ON 09/30/2023**

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VIII. CAPACITY PLAN 15

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 Scope¹

Incremental CX/UX Core:

- To implement and design a stand-alone Commercial-Off-The-Shelf (COTS) solution for the external-facing CX/UX screens of the System.
- Phase 1a is focused on developing initial claim (regular claimant) screens only.
- All appropriated, budgeted, and approved tasks necessary to implement the CX/UX solution.
- Build upon information and deliverables gleaned from the Business Process Optimization (BPO) Project.
- Subsequent transition to Application maintenance & Support.
- The solution will interface with the System for Unemployment Insurance (UI) data and retrieve/submit data necessary for UI external users to perform actions.
- The solution will support data intake from customers even if the System is down and will sync up later when the System is available.

Out of Scope

Incremental CX/UX Core:

- Any work associated with modifications to staff screens or back-office workflows.
- Any work associated with appeals and Employers and TPAs will be conducted in subsequent phases outside of RA Modernization.
- Trade Readjustment Assistance, Trade Adjustment Assistance, and Employers and TPAs will be addressed in subsequent phases. As a result, the scope is being changed to only include the claimant screens.

¹ COMMS Plain Language, Branding, and Public Relations is now being reported as a separate project.

- Standing up and configuring a CX/UX rules engine.
- Placing rules in the CX/UX rules engine.

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 each of the four functional modules within scope of the CX/UX project.	<ol style="list-style-type: none"> 1. Ensuring that business process improvements are documented prior to determining functional system change needs. 2. Ensuring that business requirements align with functional and CX/UX requirements before initiating transformation. 3. Ensuring that appropriate work and resource estimates are determined prior to submitting an updated IV-B. 4. Improved stability, reliability, and maintainability of the System. 5. Improved Reemployment Assistance service to Florida Citizens. 6. Predictable maintenance cost for the application.

C. Critical Success Factors

- The COTS solution can be implemented which meets the requirements and constraints of the CX/UX Project.
- A contractor can complete the project by 6/30/2024.
- Multiple vendors can coordinate and successfully navigate the flow of information amongst themselves and FloridaCommerce.

D. Key Dates

Key Dates (anticipated)	Importance and Relevance to the Project
06/2024	Implementation of COTS Solution

E. Major Deliverables

By 06/2024	Implementation of CX/UX solution - Vendor will design, develop, and implement the solution which meets the contract, requirements, and constraints.				
By 06/2024	Vendor Deliverables <table border="1" data-bbox="496 1671 1419 1816"> <tbody> <tr> <td data-bbox="496 1671 1419 1707">Deliverable 3 – Project Schedule</td> </tr> <tr> <td data-bbox="496 1713 1419 1749">Deliverable 7 – Performance Requirements</td> </tr> <tr> <td data-bbox="496 1755 1419 1791">Deliverable 8 – Joint Application Development Sessions</td> </tr> <tr> <td data-bbox="496 1797 1419 1822">Deliverable 9 –Requirements Report</td> </tr> </tbody> </table>	Deliverable 3 – Project Schedule	Deliverable 7 – Performance Requirements	Deliverable 8 – Joint Application Development Sessions	Deliverable 9 –Requirements Report
Deliverable 3 – Project Schedule					
Deliverable 7 – Performance Requirements					
Deliverable 8 – Joint Application Development Sessions					
Deliverable 9 –Requirements Report					

Deliverable 10 – Requirements Management Plan
Deliverable 11 – Design Specifications Document
Deliverable 12 – Detailed Technology Projects Screen and Design Document
Deliverable 13 – System Architecture and Design Document
Deliverable 14 – Interface Design Description and Integration Specification Document
Deliverable 15 – Interface Control Document
Deliverable 17 – Data Conversion Strategy Document
Deliverable 18 – Business Rules Catalog
Deliverable 20 – Continuous Modernization Strategic Roadmap
Deliverable 21 – Installation and Configuration Plan
Deliverable 22 – Migration Strategy
Deliverable 24 – Test Results Report
Deliverable 25 – Operational Readiness Test Plan and Schedule
Deliverable 26 – Lessons Learned Document
Deliverable 31 – Integration Platform Solution
Deliverable 32 – Provide a Mobile-Responsive User Interface

F. Major Milestones

Major Milestone	Milestone Description
Procurement Phase Complete	Completed
Initiation Phase Complete	In progress
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 Stakeholder	Project Interest
J. Alex Kelly	Secretary, Florida Department of Commerce
Lindsay Volpe	Deputy Secretary, Division of Workforce Services/Work Group
Domenic DiLullo	Chief Technology Officer/Work Group
Paul Forrester	Chief Information Officer/Work Group
Tisha Womack	Chief Financial Officer/Work Group
Wendy Castle	Modernization Program Owner – Business
Nicole Sanislow	Modernization Program Manager – Business
Tom Richardson	Modernization Program Manager – Strategic Planning Office
Mark Miller	Project Owner
Nicholas Kaoudis	Project Manager (Core)
Jim Sparks	Project Manager (Core)
Patrick Day	Project Manager (Core)
Todd Dzicek	Project Manager Specialist
Daniel Swaisgood	Project Manager Specialist
Thomas Hoverman	Organizational Change Management Lead
Sushma Kavarthapu	Modernization Program Manager - IT
Rose Hebert	Public Relations Manager
Karmyn Hill	Office of Accountability and Transparency
Samantha Caban	Manager, Self Service Team
Jamie Dattoli	Chief of RA Appeals
Johnathan Hill	Chief of RA Adjudication

H. Significant Project Assumptions and Constraints

Project Assumptions

- The project will have access to the appropriate state management, staff, and related Program stakeholders (internal and external) and other resources as required and as needed without delay.
- All defined Sprints for Phase 1a are to be approved and prioritized by the business.
- All defined Sprints for Phase 1a are to be completed sequentially.
- All defined Sprints for Phase 1a are to be deployed incrementally.
- A contractor can complete the project by 6/30/2024.

Project Constraints

- Phase 1a must be completed by 6/30/24.
- Must be a COTS product.

II. Work Breakdown Structure

WBS	Task Name
1	Customer Experience / User Experience (CX/UX)
1.1	Initiation
1.2	Initiation Phase complete
1.3	Planning
1.4	Planning Phase complete
1.5	Execution
1.5.1	CX/UX - Core
1.5.1.1	Procurement
1.5.1.2	Vendor Onboarding
1.5.1.3	Strat/TCS Focus Areas
1.5.1.4	Strat/TCS Contract Deliverables
1.5.1.5	FloridaCommerce
1.5.1.6	SI
1.5.2	CX/UX - Core - FINISH
1.6	Execution Phase complete
1.7	Monitoring and Controlling
1.8	Monitoring and Controlling Phase Complete
1.9	Project Closeout
1.10	Closeout Phase complete

III. Resource Loaded Project Schedule

WBS	Task Name	Duration	Start	Finish	% Complete
1	Customer Experience / User Experience (CX/UX)	744.5 days?	Wed 2/2/22	Mon 12/30/24	64%
1.1	Initiation	56 days	Fri 8/5/22	Fri 10/21/22	100%
1.2	Initiation Phase complete	0 days	Mon 10/31/22	Mon 10/31/22	100%
1.3	Planning	177 days	Mon 6/27/22	Tue 2/28/23	100%
1.4	Planning Phase complete	0 days	Tue 2/28/23	Tue 2/28/23	100%
1.5	Execution	641.5 days?	Mon 6/27/22	Mon 12/30/24	67%
1.5.1	CX/UX - Core	641.5 days?	Mon 6/27/22	Mon 12/30/24	67%
1.5.1.1	Procurement	165 days	Mon 6/27/22	Fri 2/10/23	100%
1.5.1.2	Vendor Onboarding	91.44 days	Fri 2/10/23	Wed 6/21/23	100%
1.5.1.3	Strat/TCS Focus Areas	456.5 days?	Mon 3/13/23	Mon 12/30/24	61%
1.5.1.4	Strat/TCS Contract Deliverables	295.75 days?	Mon 1/16/23	Tue 3/12/24	63%
1.5.1.5	FloridaCommerce	549.5 days?	Wed 11/2/22	Mon 12/30/24	74%
1.5.1.6	SI	190.25 days?	Tue 6/6/23	Wed 3/6/24	47%
1.5.2	CX/UX - Core - FINISH	205.25 days	Wed 3/6/24	Mon 12/30/24	0%
1.6	Execution Phase complete	205.25 days	Wed 3/6/24	Mon 12/30/24	0%
1.7	Monitoring and Controlling	543 days?	Wed 2/2/22	Mon 3/11/24	1%
1.8	Monitoring and Controlling Phase Complete	130 days	Wed 9/6/23	Mon 3/11/24	0%
1.9	Project Closeout {PM}	136 days	Fri 9/1/23	Thu 3/14/24	0%
1.10	Closeout Phase complete	0 days	Thu 3/14/24	Thu 3/14/24	0%

IV. Project Spending Plan

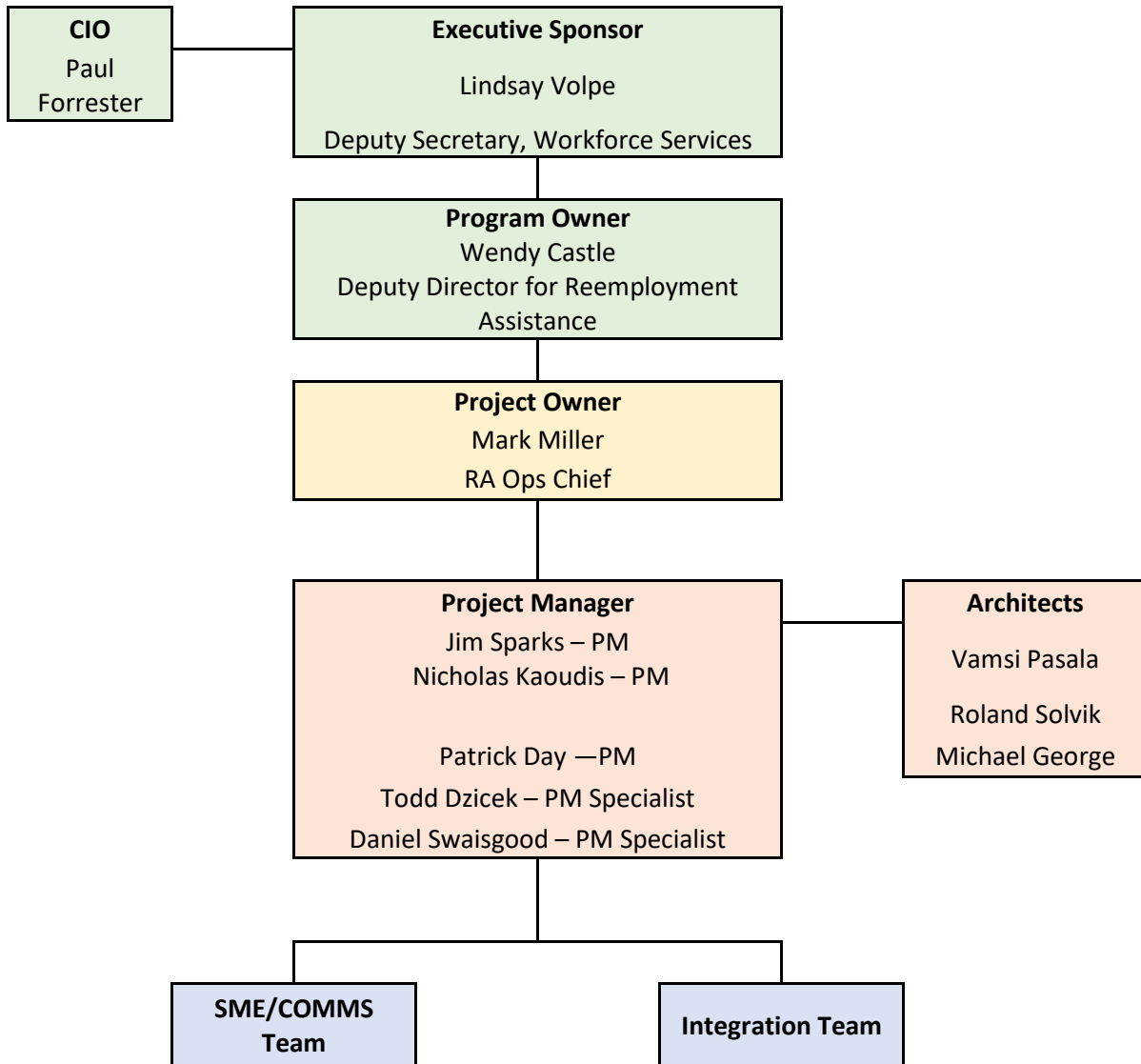
FY 2023-24 Expenditures
<i>Software: \$0.00</i>
<i>Other OpEx (Vendor Deliverables): \$8,990,430.83</i>
<i>Other CapEx: \$0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart

The purpose of the Project Organizational Chart is to identify the project team, executive governance, and project sponsorship.

Incremental CX/UX Core:



B. Project Roles and Responsibilities

The purpose of the Project Roles and Responsibilities is to identify the *major roles and responsibilities, required skills and experience levels, and interactions with other project personnel, as well as address the expected role of the project’s executive steering committee.*

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor / Work Group	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 / Work Group	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
Wendy Castle	Chief of RA	<ul style="list-style-type: none"> • 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.
Mark Miller	Project Owner/Director of Reemployment Assistance Operations	<ul style="list-style-type: none"> • 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.
Jim Sparks	Lead Project Manager (Core) Project Manager (Core) Project Manager (Core)	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures 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 Roland Solvik Michael George	Architect and Technical Lead	<ul style="list-style-type: none"> • 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 and any dependencies/impacts of other projects. • Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
Todd Dzicek Daniel Swaisgood	Project Manager Specialists	<ul style="list-style-type: none"> • Facilitates the documentation and transfer of information between the vendor and business unit. • Organizes documentation and information for review and reporting. • Assists the project manager in maintaining schedules and deliverables.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Communicates with business units and SMEs to ensure timeliness and completeness of deliverables.
SME Team (Core)	Subject Matter Expert(s)	<ul style="list-style-type: none"> 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 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..
Review Team (Core)	Documentation Reviewers	<ul style="list-style-type: none"> 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.
Vendor	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> Monitors project progress. Facilitates DEO Leadership Team Governance meetings. Provides guidance and support to project manager and project team members.
Vendor	User Interface Experts	<ul style="list-style-type: none"> Provides expertise with creating/customizing UI screens for CX/UX application.
Lindsay Volpe Karmyn Hill	Accountability and Transparency Experts	<ul style="list-style-type: none"> Provide expertise with project management and guidance. Provide expertise with public accountability and transparency.
Rose Hebert	Communications Expert	<ul style="list-style-type: none"> Provides expertise with public communications.
Mark Miller	Project Owner	<ul style="list-style-type: none"> Provides executive oversight and guidance.

Name	Project Role	Responsibility
Vendor	Oversight	<ul style="list-style-type: none"> Provides expertise with the scope of the project as it applies to Florida law.

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 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:

- 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

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	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
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	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 COMMS

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

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10/12/2023

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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:
 - o 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 Continuous Mod and on 7/6/2023 was completed through the point of SME approval.
 - Plain Language of the existing Reconnect software. This is tentatively being characterized as Plain Language Batches 8-11. It includes UI text that was not simplified through the Plain Language process in Batches 1-7. This is described in contract amendment #2 as Deliverable 8, Plain Language for Existing System.
 - Data mapping, which 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 in the last week, the CX/UX project moved to a new vendor and new CX/UX software. Deliverable 7 remains valid, and details on its execution are forthcoming.
 - o Integration of the entire scope of Plain Language files (batches 1-7) 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.
 - o Review, Approval, and Translation of the integrated CX/UX software.
 - The FloridaCommerce Secretary and Communications Director review the integrated CX/UX software; request changes, as necessary (which would be implemented by Pega); and then approve the final result.

- The approved English CX/UX 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.

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.	<ol style="list-style-type: none"> 1. Streamlined claimant workflow. 2. Simplified UI text, guides, forms, and other information. 3. 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 subject matter experts (SMEs) from FloridaCommerce. This collaboration must be managed closely to achieve the highest-quality output and to meet scheduled deadlines.

D. Key Dates

Key Dates (anticipated)	Importance and Relevance to the Project
06/2024	Project end.

E. Major Deliverables

Deliverable	Start Date	End Date
Deliverable 1: Project Kick-Off Meeting	3/20/2023	3/20/2023
Deliverable 2: Project Management Plan & Transition Plan	3/1/2023	4/6/2023
Deliverable 3: Project Schedule	1/27/2023	4/6/2023
Deliverable 4: Content Design Sessions	1/27/2023	7/12/2023
Deliverable 5: System Brand Manual	2/14/2023	6/12/2023

Deliverable 6: Plain Language Development & Translation	2/20/2023	6/30/2024
Deliverable 7: Data Mapping	10/2/2023	1/1/2024
Deliverable 8: Plain Language for Existing System	10/2/2023	1/1/2024

F. Major Milestones

Major Milestone	Milestone Description
Procurement Phase Complete	Completed
Initiation Phase Complete	In progress
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, Florida Department of Commerce
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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
Tom Richardson	Modernization Program Manager – Strategic Planning Office
Thomas Hoverman	Organizational Change Management Lead
Christian Stephens	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

- 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.
- 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

- End date of 6/30/2024 cannot be moved.

II. Work Breakdown Structure

WBS	Task Name	Duration	Com	Start	Finish
1	Comms ... START	520 days	80%	Mon 6/27/22 8:00 AM	Thu 7/4/24 5:00 PM
1.1	RA Mod	275 days	100%	Mon 6/27/22 8:00 AM	Wed 7/19/23 5:00 PM
1.2	Phase 1A Finish	0 days	100%	Fri 6/30/23 5:00 PM	Fri 6/30/23 5:00 PM
1.3	Continuous Mod	520 days	46%	Mon 6/27/22 8:00 AM	Thu 7/4/24 5:00 PM
1.3.1	Continuous Mod: Execution Start	515 days	41%	Mon 6/27/22 8:00 AM	Thu 6/27/24 5:00 PM
1.3.1.1	Continuous Mod: Phase POST-1a	376 days	14%	Mon 6/27/22 8:00 AM	Wed 12/13/23 5:00 PM
1.3.1.1.1	Execution Phase POST-1a Start	0 days	100%	Mon 6/27/22 8:00 AM	Mon 6/27/22 8:00 AM
1.3.1.1.2	Vendor Deliverables: Leftovers from Phase 1a	112 days	14%	Fri 6/30/23 5:00 PM	Wed 12/13/23 5:00 PM
1.3.1.1.2.1	Rationales	2 days	100%	Fri 6/30/23 5:00 PM	Thu 7/6/23 5:00 PM
1.3.1.1.2.2	Translations	45 days	10%	Mon 10/9/23 8:00 AM	Wed 12/13/23 5:00 PM
1.3.1.1.3	Execution Phase POST-1a Finish	0 days	0%	Wed 12/13/23 5:00 PM	Wed 12/13/23 5:00 PM
1.3.1.2	Continuous Mod: Phase 1b Start	275 days	37%	Fri 3/3/23 5:00 PM	Thu 4/4/24 5:00 PM
1.3.1.2.1	Execution Phase 1b Start	0 days	100%	Fri 6/30/23 5:00 PM	Fri 6/30/23 5:00 PM
1.3.1.2.2	Vendor Deliverables	275 days	37%	Fri 3/3/23 5:00 PM	Thu 4/4/24 5:00 PM
1.3.1.2.3	Execution Phase 1b Finish	0 days	0%	Tue 1/16/24 5:00 PM	Tue 1/16/24 5:00 PM
1.3.1.3	Continuous Mod: Phase 1c Start	270 days	51%	Mon 6/5/23 5:00 PM	Thu 6/27/24 5:00 PM
1.3.1.3.1	Execution Phase 1c Start	0 days	100%	Mon 6/5/23 5:00 PM	Mon 6/5/23 5:00 PM
1.3.1.3.2	Vendor Deliverables	270 days	51%	Mon 6/5/23 5:00 PM	Thu 6/27/24 5:00 PM
1.3.1.3.3	Execution Phase 1c Finish	0 days	0%	Thu 6/27/24 5:00 PM	Thu 6/27/24 5:00 PM
1.3.2	Continuous Mod: Execution Finish	0 days	0%	Thu 6/27/24 5:00 PM	Thu 6/27/24 5:00 PM
1.3.3	Continuous Mod: Monitoring Start	148 days	57%	Thu 6/8/23 1:00 PM	Fri 1/12/24 12:00 PM
1.3.3.1	Weekly Status Report	144 days	61%	Thu 6/8/23 1:00 PM	Mon 1/8/24 12:00 PM
1.3.3.2	Monthly Status Report	114 days	16%	Fri 7/28/23 1:00 PM	Fri 1/12/24 12:00 PM
1.3.3.3	Status Meetings	112 days	64%	Wed 7/5/23 8:00 AM	Wed 12/13/23 5:00 PM
1.3.4	Continuous Mod: Monitoring Finish	0 days	0%	Fri 1/12/24 12:00 PM	Fri 1/12/24 12:00 PM
1.3.5	Continuous Mod: Closeout Start	5 days	0%	Fri 6/28/24 8:00 AM	Thu 7/4/24 5:00 PM
1.3.5.1	Lessons Learned submitted to SPO	1 day	0%	Fri 6/28/24 8:00 AM	Fri 6/28/24 5:00 PM
1.3.5.2	Final OWP Updates	1 day	0%	Mon 7/1/24 8:00 AM	Mon 7/1/24 5:00 PM
1.3.5.3	Final Weekly & Monthly Status Reports	1 day	0%	Tue 7/2/24 8:00 AM	Tue 7/2/24 5:00 PM
1.3.5.4	Final Schedule Updates	1 day	0%	Wed 7/3/24 8:00 AM	Wed 7/3/24 5:00 PM
1.3.5.5	Comms contribution to closeout report submitted to Core PM	1 day	0%	Thu 7/4/24 8:00 AM	Thu 7/4/24 5:00 PM
1.3.6	Continuous Mod: Closeout Finish	0 days	0%	Thu 7/4/24 5:00 PM	Thu 7/4/24 5:00 PM
2	Comms ... FINISH	0 days	0%	Thu 7/4/24 5:00 PM	Thu 7/4/24 5:00 PM

III. Resource Loaded Project Schedule

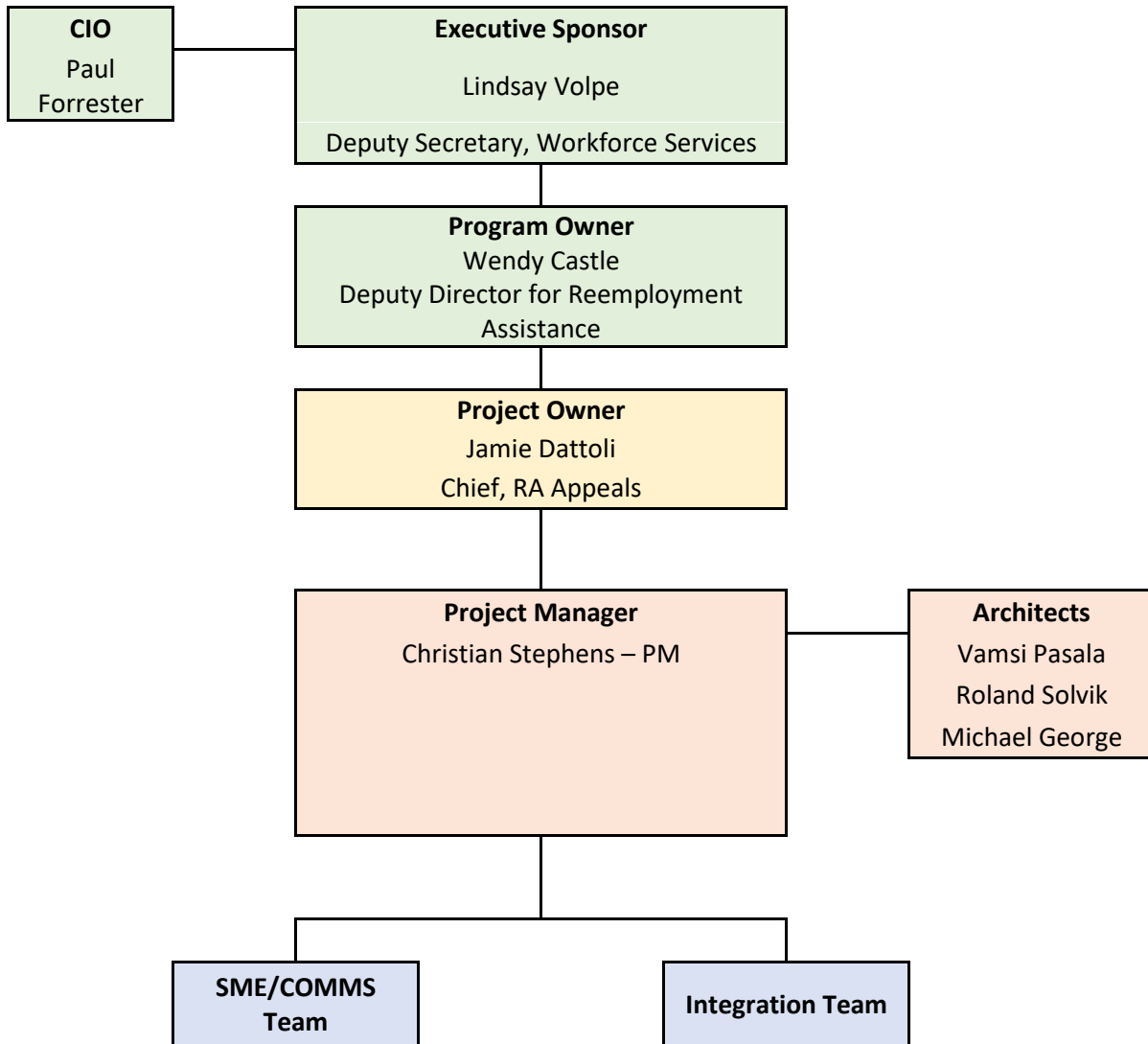
The resource-loaded project schedule is available on [Sharepoint](#).

IV. Project Spending Plan

FY 2023-24 Expenditures
Software: \$0.00
Other OpEx (Vendor Deliverables): \$986,540.28
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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • 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 / Work Group	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.
Christian Stephens	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures compliance with project plan. • Monitors project progress and schedule adherence. • Completes all documents related to the project.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Identifies and manages risks according to the project plan. Manages vendor deliverables and schedule adherence.
SME Team (Core)	Subject Matter Expert(s)	<ul style="list-style-type: none"> 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 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
Review Team (Core)	Documentation Reviewers	<ul style="list-style-type: none"> 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
Vendor: Varied	Strategic Planning Office (SPO)	<ul style="list-style-type: none"> Monitors project progress. Facilitates Commerce Leadership Team Governance meetings. Provides guidance and support to project manager and project team members.
Vendor: Beacon	Plain Language and Branding	<ul style="list-style-type: none"> Provides expertise with simplifying all in-scope information via a “plain language” process. Manages the translation of simplified information into Spanish and Haitian Creole.
Vendor: KPMG	Oversight	<ul style="list-style-type: none"> Provides expertise with the scope of the project as it applies to Florida law.

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 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:

- 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

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	Medium	High	Adjust schedule accordingly	PM
Divisional and/or Bureau resistance of new process	Medium	Medium	Involve management and impacted staff throughout engagement to increase adoption rate and ensure a successful transition	PM
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	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
Procurement Delays for CX/UX	High	Medium	Communication with Senior Leadership and Procurement Team(s).	PM/Project Owner/Senior Leadership

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 REPORTS

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

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10/11/2023

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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 Connect 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, 2023, 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, 2023, 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 FloridaCommerce'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 Connect 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	<ul style="list-style-type: none"> Provides more efficient tool for reporting/data for staff use. Provides round-the-clock availability of reports and data. Removes the dependency on the Connect system and improves the modularization of the Connect foundation.
Eliminates the Crystal Reports Server	<ul style="list-style-type: none"> Allows Florida Commerce to retire the legacy Crystal Reports server and software at the end of its useful life.
Removes batches (if any) from nightly batch processing	<ul style="list-style-type: none"> Removing batches leaves more time for higher priority batch jobs.

C. Critical Success Factors

- 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 211: Develop Average Processing Time for Appeals Cases Report (322) CRPT 213: Develop Deputy Clerk Productivity Report CRPT 217: Docketing Productivity Report CRPT 227: Develop Time Lapse Percentage CRPT 280: Develop Appeals Weekly Time Lapse Report CRPT 112: Develop UC Benefits Payment Register Report in Tableau CRPT 236: Develop IP Address Search Report CRPT 26: Develop Cumulative Totals Report

Key Date	Importance and Relevance to the Project
	CRPT 31: Develop Daily, Monthly SSA Statistics Report CRPT 237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly CRPT 98: Develop STC Summary Report CRPT 115: Develop Untimely First Payment Report CRPT 253: Develop Earnings Weekly, Monthly Determinations by Examiner CRPT 281: Develop Wage Audit Predeterminations Report CRPT 357: Develop Long Term Dated Stops Report
October 4 – November 15, 2023 Build 323	CRPT359 Appeals Reversals Weekly Report (323) CRPT360 Appeals Reversals Monthly Report CRPT363 Auto Adjudicated JSR Report CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report CRPT371 CanceledNonMonPending CRPT02 Analysis of Overpayments by Cause CRPT283 Blocked Claims Issue CRPT354 Automated Wage Update Detail Report CRPT355 Automated Wage Update Workflow Report CRPT110 Twelve Month Old Cancellation Claims and Benefits - UBXFIND2605 CRPT101 TAA TRA Waivers to Exhaust in 14 days CRPT373 DUA Applications Report CRPT377AD DUA Activity - Applications Denied CRPT113 UC Liabilities Report CRPT377 DUA Activity Report
September 25 – December 11, 2023 Build 324	CRPT240 CHECK FOR NEW UI ELIGIBILITY (324) CRPT244 DUA Claims Terminated CRPT250 New Hire Late ADJ Fact-Finding Notifications CRPT263 Unidentified Employer Protest Documents Queue CRPT264 Process Response to Notice of Claim Queue CRPT292 Adjudicator Protest Determination Data Daily CRPT293 Adjudicator Protest Determination Data Weekly CRPT301S Determination Status Report CRPT302 Auto-Adjudication Details CRPT312 Issues Holding Payments (Revised 03/28/2020) CSV CRPT386 Adjudicator Void Weekly CSV CRPT395 Straight DUA Adjudication Timely Payment CRPT282 PRNC Closed Work Items CRPT196 RETRO HOLD REPORT CRPT270 Filed Appeals and Overpayment
November 6 – January 8, 2024 Build 325	CRPT271 Disposed Appeals and Overpayment (325) CRPT193 Overpayments Held for Review CRPT197 FALL THROUGH OVERPAYMENTS CRPT261 BPC Appeals Hearing CRPT274 Wage Audit Overpayment Repayment CRPT274F Supplemental Wage Audit Overpayment Repayment CSV

Key Date	Importance and Relevance to the Project
	CRPT334 Wage_Determination_Issues Report CRPT361 Earning Overpayments by Overpaid Weeks Report CRPT389F Supplemental Overpayment Report CRPT450 1099G All Generated CSV CRPT451 1099G Status Counts Per Output Type CSV CRPT99 Summary Detail Tax Withholding CRPT230 BTQ Case History Report CRPT231 BAM Case History Report CRPT246 BAM Open Cases
November 27 – February 5, 2024 Build 326	CRPT266 BTQ Universe (326) CRPT322 New Hire Fictitious Employers - DOR CRPT116F FPUC Voucher Payment Summary CRPT116L LWA Voucher Payment Summary CRPT265 Protest Benefit Charges Workflow Queue Daily CRPT265D Protest Benefit Charges Workflow Queue CRPT265M Protest Benefit Charges Workflow Queue Monthly CRPT265W Protest Benefit Charges Workflow Queue Weekly CRPT258 QBC Report CSV CRPT05 Benefit Payment Control Cash Offset Activity CRPT11 Claimant Repayment Summary CRPT117 Waiver Status Report CRPT13 Collection Agency Reconciliation Report CRPT139 Repayment Adjustment Detail Report CRPT144 Released Special Voucher Payments
December 26, 2023 – March 4, 2024 Build 327	CRPT29 Daily Deposit Report (327) CRPT307 Over - Under Counts Report CRPT325 Reconciliation Daily CRPT325W Reconciliation Weekly CRPT33 Debtor Credit Balance Refund Report CRPT35 Deposit Detail Report CRPT35D Deposit Detail Daily Report CRPT91 Refund Status Report CRPT161 Daily REA Productivity Report CRPT161W Weekly REA Productivity Report CRPT392 Certification Amounts and Counts CRPT324 Initial and Continued Claims by County of Residence (Weekly) CRPT326 Initial and Continued Claims by County of Residence (Monthly) CRPT232 Agency New Hire Report CRPT243 Reimbursable Employer Monthly Charge CSV
January 22 – April 1, 2024 Build 328	CRPT262 Waiting Week Exemption Report (328) CRPT462 Daily SAVE Productivity Report CRPT400 Effective Date Change (CWC-FE-X Claims) CRPT116 Voucher Payment Summary - UB2152-UB215 CRPT192 Payments Held for Review (HDEX) CSV CRPT195 Manual Payments Detail CRPT233 On-demand EFT Deposit Report

Key Date	Importance and Relevance to the Project
	CRPT257 Failed Document Status After Nightly Batch CRPT269 FL DEBC Payments CRPT228 Time Lapse Statistics CRPT108 TRA Waivers Issued and Revoked Report CRPT194 STC Plan Review Report CRPT272 DUA Irma Payment Detail By Claimant And Week CRPT273 DUA Irma Payment Totals By Claimant And Week CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims
February 26 - April 29, 2024 Build 329	CRPT152 Pre-Certification Details Report (329) CRPT245 UCFE-UCX Pending Monetary After 13 Days CRPT247 FL CWC Reject 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 CRPT100 Summary of Daily Disbursement Report CRPT118 Weekly Internet Claims Statistics CRPT143 Initial Skills Review Statistics Report CRPT239 Regional Workforce Breakdown of ETA 9129 Regional Workforce Breakdown of ETA 9129 CRPT267 FSDEB CSV CRPT275S 13082 Sally DUA Appeals Disposed Report
March 18 – May 27, 2024 Build 330	CRPT277 Straight DUA - UCFE, UCX, CWC Claims (330) CRPT279 BIU-Wage Audit Adjudicator Wokflow 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
April 22 – June 24, 2024 Build 331	CRPT299 412s Stuck in Pend or Proc (331) CRPT300 Determination Status - 9:00 AM CRPT301 Determination Status - 3:30 PM CRPT303 Adjudicator Quality Nonmon Determinations CRPT304 Outstanding Workflow Items CRPT305 412 Pull Queue report CRPT308 TRA Quarter Activity Counts and Details

Key Date	Importance and Relevance to the Project
	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
May 13 – July 22, 2024 Build 332	CRPT318 Issue Creation Report (332) 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 CRPT333 PRNC Priority Items Report CRPT335 Voucher Details CRPT336 ETA-207 Report CRPT337 Workflow Queue Report CRPT339 Taxes Paid on Locked Claims Report CRPT34 Claims Purged Report
June 17 – August 19, 2024 Build 333	CRPT340 NDNH New Hire Fictitious Employers Report (333) 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 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
July 15 – September 16, 2024 Build 334	CRPT373S 13082 Sally DUA Application Report (334) 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

Key Date	Importance and Relevance to the Project
	CRPT387 Adjudicator Auto Adjudication Weekly CSV CRPT388 DUA_LA_Call_Center_counts CRPT391S 13082 Sally DUA Appeals Filed Report CRPT393 Pre-Certification Amounts and Counts Pre-Certification Amounts and Counts CRPT396 DUA Related Timely Payment CRPT397 Pending DUA Workload Items CRPT399 ETA 207 Validation Report
July 22 – October 14, 2024 Build 335	CRPT401 IB4Q Inbound Daily Report (335) 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 CRPT40MD DUA Financial Monthly - Straight DUA CRPT40MR DUA Financial Monthly - Related DUA CRPT40QD DUA Financial Quarterly - Straight DUA CRPT40QR DUA Financial Quarterly - Related DUA
August 26 – November 11, 2024 Build 336	CRPT40WR DUA Financial Weekly - Related DUA (336) 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
October 7 – December 9, 2024 Build 337	CRPT424F Supplemental_(FPUC, LWA, MEUC, WW)_Payment CSV (337) CRPT425 PEGA Unregistered Claim Count CRPT426 ALM99228_RFI_First Payments_Prod CRPT427 RFI_ALM99322_Pega_Claims_Count CRPT428 Open EIRP Workflow Items CSV CRPT429 Daily Report of Ingested Pega Claims to CONNECT CSV

Key Date	Importance and Relevance to the Project
	CRPT430 COVID-19 Adjudication report CSV CRPT431 COVID-19 Appeals Filed report CRPT432 COVID-19 Appeals Disposed report CRPT433 COVID-19 Applications report CSV CRPT434 TFS94377_firre_rfi CRPT437 Debit Card list for Communication CRPT438 Pending Monetary Management Workflow Queue CRPT439 Open and Pend CWAS Workflows CRPT441 1099G Summary Report
October 28, 2024 - January 6, 2025 Build 338	CRPT444 UC_Benefit_Payments CSV (338) 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 CRPT457 SOL Wage Issues Report CSV CRPT458 Supplemental (FPUC, LWA, MEUC, WW) Payments Issued on Locked Claims CRPT459 Overpayments Eligible for Collection Agency Referral CRPT462W Weekly SAVE Productivity Report CRPT59 Manual Charge Relief Report CRPT72 NM QIP SATA - MONTHLY CRPT79F Supplemental Overpayments Established for the Month CSV CRPT85 Processed Cancelled and Replacement Payments DATETIME CRPT874 ALM109874_RFI_ETA539 CRPT92 Reissue Payment -UB2681-RQLST
December 2, 2024 – February 3, 2025 Build 339	CRPT93 Report of Good/Not Good Job Prospects_SRR (339)

E. Major Deliverables

While the 60GG documents are important, the value is in the products delivered to the customer.

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

The Key Dates section lists the major milestones for project delivery.

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 15 Reports
Build 323 - November 15, 2023	Delivery of 15 Reports
Build 324 - December 11, 2023	Delivery of 15 Reports
Build 325 - January 8, 2024	Delivery of 15 Reports
Build 326 - February 5, 2024	Delivery of 15 Reports
Build 327 - March 4, 2024	Delivery of 15 Reports
Build 328 - April 1, 2024	Delivery of 15 Reports
Build 329 - April 29, 2024	Delivery of 15 Reports
Build 330 – May 27, 2024	Delivery of 15 Reports
Build 331 - June 24, 2024	Delivery of 15 Reports
Build 332 - June 24, 2024	Delivery of 15 Reports
Build 333 - August 19, 2024	Delivery of 15 Reports
Build 334 - September 16, 2024	Delivery of 15 Reports
Build 335 - October 14, 2024	Delivery of 15 Reports
Build 336 - November 11, 2024	Delivery of 15 Reports
Build 337 - December 9, 2024	Delivery of 15 Reports
Build 338 - January 6, 2025	Delivery of 15 Reports
Build 339 – February 3, 2025	Delivery of Last Report

G. Key Stakeholders

Business units in Workforce Services are stakeholders for this project.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Florida Department of Commerce
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
Mark Miller	Reemployment Assistance Stakeholder
Nicole Sanislow	Modernization Program Manager – Business
Tom Richardson	Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Nicholas Kent, Matthew Mask	Project Owner
Linda Lawler	Project Manager

H. Significant Project Assumptions and Constraints

There are no significant assumptions or constraints, only small items.

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.

Project Constraints

1. The project must end by June 28, 2024, regardless of remaining reports.
2. Project Team availability is shared with other priorities, (production support for ETA reports, existing crystal reports, population validation, etc.)

II. Work Breakdown Structure

The work breakdown structure for the Reports project is shown below.

WBS	Task Name
0	Reports
1	Project Management
1.1	Discovery/Initiation
1.2	Planning
1.3	Executing
1.4	Monitor & Control
1.5	Closing
2	Benefits Identification and Measures
3	Reports Process Operational Support
4	Product Delivery
4.1	Evaluate Sources of Crystal Reports and Related Batches
4.2	Collect Infrastructure Related Crystal Report budget costs
4.3	Operational Project Transition Completed
4.4	CRPT 211: Develop Average Processing Time for Appeals Cases Report (322)
4.5	CRPT 213: Develop Deputy Clerk Productivity Report
4.6	CRPT 217: Develop Docketing Productivity Report
4.7	CRPT 227: Develop Time Lapse Percentage
4.8	CRPT 280: Develop Appeals Weekly Time Lapse Report
4.9	CRPT 112: Develop UC Benefits Payment Register Report in Tableau
4.1	CRPT 236: Develop IP Address Search Report
4.11	CRPT 26: Develop Cumulative Totals Report
4.12	CRPT 31: Develop Daily, Monthly SSA Statistics Report
4.13	CRPT 237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly

WBS	Task Name
4.14	CRPT 98: Develop STC Summary Report
4.15	CRPT 115: Develop Untimely First Payment Report
4.16	CRPT 253: Develop Earnings Weekly, Monthly Determinations by Examiner
4.17	CRPT 281: Develop Wage Audit Predeterminations Report
4.18	CRPT 357: Develop Long Term Dated Stops Report
4.19	CRPT359 Appeals Reversals Weekly Report (323)
4.2	CRPT360 Appeals Reversals Monthly Report
4.21	CRPT363 Auto Adjudicated JSR Report
4.22	CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report
4.23	CRPT371 CanceledNonMonPending
4.24	CRPT02 Analysis of Overpayments by Cause
4.25	CRPT283 Blocked Claims Issue
4.26	CRPT354 Automated Wage Update Detail Report
4.27	CRPT355 Automated Wage Update Workflow Report
4.28	CRPT110 Twelve Month Old Cancellation Claims and Benefits - UBXFIND2605
4.29	CRPT101 TAA TRA Waivers to Exhaust in 14 days
4.3	CRPT373 DUA Applications Report
4.31	CRPT377AD DUA Activity - Applications Denied
4.32	CRPT113 UC Liabilities Report
4.33	CRPT377 DUA Activity Report
4.34	CRPT240 CHECK FOR NEW UI ELIGIBILITY (324)
4.35	CRPT244 DUA Claims Terminated
4.36	CRPT250 New Hire Late ADJ Fact-Finding Notifications
4.37	CRPT263 Unidentified Employer Protest Documents Queue
4.38	CRPT264 Process Response to Notice of Claim Queue
4.39	CRPT292 Adjudicator Protest Determination Data Daily
4.4	CRPT293 Adjudicator Protest Determination Data Weekly
4.41	CRPT301S Determination Status Report
4.42	CRPT302 Auto-Adjudication Details
4.43	CRPT312 Issues Holding Payments (Revised 03/28/2020) CSV
4.44	CRPT386 Adjudicator Void Weekly CSV
4.45	CRPT395 Straight DUA Adjudication Timely Payment
4.46	CRPT282 PRNC Closed Work Items
4.47	CRPT196 RETRO HOLD REPORT
4.48	CRPT270 Filed Appeals and Overpayment
4.49	CRPT271 Disposed Appeals and Overpayment (325)
4.5	CRPT193 Overpayments Held for Review
4.51	CRPT197 FALL THROUGH OVERPAYMENTS

WBS	Task Name
4.52	CRPT261 BPC Appeals Hearing
4.53	CRPT274 Wage Audit Overpayment Repayment
4.54	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV
4.55	CRPT334 Wage_Determination_Issues Report
4.56	CRPT361 Earning Overpayments by Overpaid Weeks Report
4.57	CRPT389F Supplemental Overpayment Report
4.58	CRPT450 1099G All Generated CSV
4.59	CRPT451 1099G Status Counts Per Output Type CSV
4.6	CRPT99 Summary Detail Tax Withholding
4.61	CRPT230 BTQ Case History Report
4.62	CRPT231 BAM Case History Report
4.63	CRPT246 BAM Open Cases
4.64	CRPT266 BTQ Universe (326)
4.65	CRPT322 New Hire Fictitious Employers - DOR
4.66	CRPT116F FPUC Voucher Payment Summary
4.67	CRPT116L LWA Voucher Payment Summary
4.68	CRPT265 Protest Benefit Charges Workflow Queue Daily
4.69	CRPT265D Protest Benefit Charges Workflow Queue
4.7	CRPT265M Protest Benefit Charges Workflow Queue Monthly
4.71	CRPT265W Protest Benefit Charges Workflow Queue Weekly
4.72	CRPT258 QBC Report CSV
4.73	CRPT05 Benefit Payment Control Cash Offset Activity
4.74	CRPT11 Claimant Repayment Summary
4.75	CRPT117 Waiver Status Report
4.76	CRPT13 Collection Agency Reconciliation Report
4.77	CRPT139 Repayment Adjustment Detail Report
4.78	CRPT144 Released Special Voucher Payments
4.79	CRPT29 Daily Deposit Report (327)
4.8	CRPT307 Over - Under Counts Report
4.81	CRPT325 Reconciliation Daily
4.82	CRPT325W Reconciliation Weekly
4.83	CRPT33 Debtor Credit Balance Refund Report
4.84	CRPT35 Deposit Detail Report
4.85	CRPT35D Deposit Detail Daily Report
4.86	CRPT91 Refund Status Report
4.87	CRPT161 Daily REA Productivity Report
4.88	CRPT161W Weekly REA Productivity Report
4.89	CRPT392 Certification Amounts and Counts

WBS	Task Name
4.9	CRPT324 Initial and Continued Claims by County of Residence (Weekly)
4.91	CRPT326 Initial and Continued Claims by County of Residence (Monthly)
4.92	CRPT232 Agency New Hire Report
4.93	CRPT243 Reimbursable Employer Monthly Charge CSV
4.94	CRPT262 Waiting Week Exemption Report (328)
4.95	CRPT462 Daily SAVE Productivity Report
4.96	CRPT400 Effective Date Change (CWC-FE-X Claims)
4.97	CRPT116 Voucher Payment Summary - UB2152-UB215
4.98	CRPT192 Payments Held for Review (HDEX) CSV
4.99	CRPT195 Manual Payments Detail
4.1	CRPT233 On-demand EFT Deposit Report
4.101	CRPT257 Failed Document Status After Nightly Batch
4.102	CRPT269 FL DEBC Payments
4.103	CRPT228 Time Lapse Statistics
4.104	CRPT108 TRA Waivers Issued and Revoked Report
4.105	CRPT194 STC Plan Review Report
4.106	CRPT272 DUA Irma Payment Detail By Claimant And Week
4.107	CRPT273 DUA Irma Payment Totals By Claimant And Week
4.108	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims
4.109	CRPT152 Pre-Certification Details Report (329)
4.11	CRPT245 UCFE-UCX Pending Monetary After 13 Days
4.111	CRPT247 FL CWC Reject
4.112	CRPT248 Out of State (Shell) Claims Reject
4.113	CRPT249 UCFE AND UCX Reject
4.114	CRPT251 UCX/UCFE Timely Payment Report
4.115	CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims
4.116	CRPT259 Florida Paying CWC
4.117	CRPT260 INBOUND IB6 bill
4.118	CRPT100 Summary of Daily Disbursement Report
4.119	CRPT118 Weekly Internet Claims Statistics
4.12	CRPT143 Initial Skills Review Statistics Report
4.121	CRPT239 Regional Workforce Breakdown of ETA 9129 Regional Workforce Breakdown of ETA 9129
4.122	CRPT267 FSDEB CSV
4.123	CRPT275S 13082 Sally DUA Appeals Disposed Report
4.124	CRPT277 Straight DUA - UCFE, UCX, CWC Claims (330)
4.125	CRPT279 BIU-Wage Audit Adjudicator Wokflow
4.126	CRPT284 Release HDID Report

WBS	Task Name
4.127	CRPT285 IB6I BILL STATUS
4.128	CRPT286 Detailed Untimely/Timely 1st Pay Report
4.129	CRPT287 Claims That Become Unlocked
4.13	CRPT288 Issues In-Progress Status Non-SOL Daily Report
4.131	CRPT289 BIU Appeals Decisions Notices
4.132	CRPT290 Debit Card Rejects Report
4.133	CRPT291 Child Support Percentage
4.134	CRPT294 Pending Monetary CSV
4.135	CRPT295 All UCO2 generated
4.136	CRPT296 UC02 Not generated due to Locked Claimants or Claims list
4.137	CRPT297 UCO2 Status Counts
4.138	CRPT298 Employers or Agents having more than 100 UCO2s
4.139	CRPT299 412s Stuck in Pend or Proc (331)
4.14	CRPT300 Determination Status - 9:00 AM
4.141	CRPT301 Determination Status - 3:30 PM
4.142	CRPT303 Adjudicator Quality Nonmon Determinations
4.143	CRPT304 Outstanding Workflow Items
4.144	CRPT305 412 Pull Queue report
4.145	CRPT308 TRA Quarter Activity Counts and Details
4.146	CRPT309 FIRRE Employer Noncharge Report
4.147	CRPT310 Reopen After Wait Week Report
4.148	CRPT311 Collection Agency Exclusion list
4.149	CRPT313 Work_Items_Closed - Terminated_Daily Report
4.15	CRPT314 EARN Issues Pending Report CSV
4.151	CRPT315 ICON Matrix (UCX-UCFE) Report
4.152	CRPT316 Equifax Inbound FED4 Electronic Responses
4.153	CRPT317 Staff Handled Monetary Determination and Redeterminations
4.154	CRPT318 Issue Creation Report (332)
4.155	CRPT319 Waived Overpayments Report
4.156	CRPT321 CWAS Queue Month to Month Report
4.157	CRPT323 New Work Items All Staff Counts Report
4.158	CRPT327 Payments by County of Residence
4.159	CRPT328 412 Employer Protest Pending Queue Items Report
4.16	CRPT329 412 Employer Protest Worked Queue Items Report
4.161	CRPT330 Appeals Metrics Report
4.162	CRPT331 Earnings and Remuneration Stuck as Affirmed Report
4.163	CRPT333 PRNC Priority Items Report
4.164	CRPT335 Voucher Details

WBS	Task Name
4.165	CRPT336 ETA-207 Report
4.166	CRPT337 Workflow Queue Report
4.167	CRPT339 Taxes Paid on Locked Claims Report
4.168	CRPT34 Claims Purged Report
4.169	CRPT340 NDNH New Hire Fictitious Employers Report (333)
4.17	CRPT341 Wage report for claims requesting monetary reconsideration
4.171	CRPT343 SIDES Failed Separation Posts
4.172	CRPT344 SIDES Failed Earnings Verification Posts
4.173	CRPT345 SIDES Earnings Verification Response Report
4.174	CRPT347 Benefits by County of Residence Monthly
4.175	CRPT348 Benefits by County of Residence Annually
4.176	CRPT349 Civil Court Collections
4.177	CRPT350 Deceased Claimant Report
4.178	CRPT364 Daily Reporting Requirement Issues Report
4.179	CRPT365 SAVE Work authorization Report
4.18	CRPT366 Lack of Work queue list Report
4.181	CRPT367 Employer/TPA Login Counts Report
4.182	CRPT370 CNCL_Adjudication_weekly CSV
4.183	CRPT372 CNCL_Adjudication_Daily CSV
4.184	CRPT373S 13082 Sally DUA Application Report (334)
4.185	CRPT374 DUA Federal Management Report
4.186	CRPT375 DUA Adjudication Report
4.187	CRPT375S 13082 Sally DUA Adjudication Report
4.188	CRPT376 DUA Audit - Payments Report
4.189	CRPT377S 13082 Sally DUA Activity Report
4.19	CRPT379 All Cases Assigned by Staff Outside Batch 265
4.191	CRPT385 Adjudicator Data Determination Weekly CSV
4.192	CRPT387 Adjudicator Auto Adjudication Weekly CSV
4.193	CRPT388 DUA_LA_Call_Center_counts
4.194	CRPT391S 13082 Sally DUA Appeals Filed Report
4.195	CRPT393 Pre-Certification Amounts and Counts Pre-Certification Amounts and Counts
4.196	CRPT396 DUA Related Timely Payment
4.197	CRPT397 Pending DUA Workload Items
4.198	CRPT399 ETA 207 Validation Report
4.199	CRPT401 IB4Q Inbound Daily Report (335)
4.2	CRPT402 FL CWC Recoverable Overpayment Report
4.201	CRPT403 Apply for PUA Link
4.202	CRPT404 Expired Claims

WBS	Task Name
4.203	CRPT405 Exhausted Claims
4.204	CRPT406 Annual Overpayments Established by Month
4.205	CRPT407 1720A_Referred
4.206	CRPT408 1720B_Not_Referred
4.207	CRPT409 1720C_Written_Off_Waived
4.208	CRPT40DD DUA Financial Daily - Straight DUA
4.209	CRPT40DR DUA Financial Daily - Related DUA
4.21	CRPT40MD DUA Financial Monthly - Straight DUA
4.211	CRPT40MR DUA Financial Monthly - Related DUA
4.212	CRPT40QD DUA Financial Quarterly - Straight DUA
4.213	CRPT40QR DUA Financial Quarterly - Related DUA
4.214	CRPT40WR DUA Financial Weekly - Related DUA (336)
4.215	CRPT41 DUA-UI-ISSUES
4.216	CRPT410 Corrected Earnings Report for Auto Requested Weeks
4.217	CRPT411 Workflow SCIN Productivity
4.218	CRPT412 Workflow SCIN New and In Progress
4.219	CRPT413 Workflow SCIN Backlog
4.22	CRPT414 Workflow Returned Mail Productivity
4.221	CRPT415 Workflow Returned Mail New and In Progress
4.222	CRPT416 Workflow Returned Mail Backlog
4.223	CRPT417 Claimants_PEUC_NO_Weeks CSV
4.224	CRPT418 Claimants_PUA_NO_Weeks CSV
4.225	CRPT419 RA_Mon_Eligible_No_Weeks CSV
4.226	CRPT420 Claim Counts by FIRRE State Montly Report
4.227	CRPT423 Debit Card Payment Recovery
4.228	CRPT424 State_And_Federal_Program (RA, PEUC, EB, PUA)_Payments CSV
4.229	CRPT424F Supplemental (FPUC, LWA, MEUC, WW)_Payment CSV (337)
4.23	CRPT425 PEGA Unregistered Claim Count
4.231	CRPT426 ALM99228_RFI_First Payments_Prod
4.232	CRPT427 RFI_ALM99322_Pega_Claims_Count
4.233	CRPT428 Open EIRP Workflow Items CSV
4.234	CRPT429 Daily Report of Ingested Pega Claims to CONNECT CSV
4.235	CRPT430 COVID-19 Adjudication report CSV
4.236	CRPT431 COVID-19 Appeals Filed report
4.237	CRPT432 COVID-19 Appeals Disposed report
4.238	CRPT433 COVID-19 Applications report CSV
4.239	CRPT434 TFS94377_firre_rfi
4.24	CRPT437 Debit Card list for Communication

WBS	Task Name
4.241	CRPT438 Pending Monetary Management Workflow Queue
4.242	CRPT439 Open and Pend CWAS Workflows
4.243	CRPT441 1099G Summary Report
4.244	CRPT444 UC_Benefit_Payments CSV (338)
4.245	CRPT452 1099G Amount For Each Claimant CSV
4.246	CRPT453 49T All Generated CSV
4.247	CRPT454 49T Status Counts Per Output Type CSV
4.248	CRPT455 49T Amount Greater Than \$1 CSV
4.249	CRPT457 SOL Wage Issues Report CSV
4.25	CRPT458 Supplemental (FPUC, LWA, MEUC, WW) Payments Issued on Locked Claims
4.251	CRPT459 Overpayments Eligible for Collection Agency Referral
4.252	CRPT462W Weekly SAVE Productivity Report
4.253	CRPT59 Manual Charge Relief Report
4.254	CRPT72 NM QIP SATA - MONTHLY
4.255	CRPT79F Supplemental Overpayments Established for the Month CSV
4.256	CRPT85 Processed Cancelled and Replacement Payments DATETIME
4.257	CRPT874 ALM109874_RFI_ETA539
4.258	CRPT92 Reissue Payment -UB2681-RQLST
4.259	CRPT93 Report of Good/Not Good Job Prospects_SRR (339)

III. *Resource Loaded Project Schedule*

The RAD Data Warehouse Team are assigned to every task.

WBS	Task Name	Duration	Start	Finish	Predecessors
0	Reports	416 days	Mon 7/3/23	Mon 2/3/25	
1	Project Management	260 days	Mon 7/3/23	Fri 6/28/24	
1.1	Discovery/Initiation	70 days	Mon 7/3/23	Fri 10/6/23	
1.2	Planning	73 days	Mon 7/3/23	Wed 10/11/23	
1.3	Executing	250 days	Mon 7/3/23	Fri 6/14/24	
1.4	Monitor & Control	250 days	Mon 7/3/23	Fri 6/14/24	
1.5	Closing	10 days	Mon 6/17/24	Fri 6/28/24	
2	Benefits Identification and Measures	250 days	Mon 7/3/23	Fri 6/14/24	
3	Reports Process Operational Support	20 days	Mon 10/9/23	Fri 11/3/23	
4	Product Delivery	416 days	Mon 7/3/23	Mon 2/3/25	
4.1	Evaluate Sources of Crystal Reports and Related Batches	250 days	Mon 7/3/23	Fri 6/14/24	
4.2	Collect Infrastructure Related Crystal Report budget costs	250 days	Mon 7/3/23	Fri 6/14/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.3	Operational Project Transition Completed	60 days	Mon 7/3/23	Fri 9/22/23	
4.4	CRPT 211: Develop Average Processing Time for Appeals Cases Report (322)	16 days	Mon 9/25/23	Mon 10/16/23	
4.5	CRPT 213: Develop Deputy Clerk Productivity Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.6	CRPT 217: Develop Docketing Productivity Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.7	CRPT 227: Develop Time Lapse Percentage	16 days	Mon 9/25/23	Mon 10/16/23	
4.8	CRPT 280: Develop Appeals Weekly Time Lapse Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.9	CRPT 112: Develop UC Benefits Payment Register Report in Tableau	16 days	Mon 9/25/23	Mon 10/16/23	
4.1	CRPT 236: Develop IP Address Search Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.11	CRPT 26: Develop Cumulative Totals Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.12	CRPT 31: Develop Daily, Monthly SSA Statistics Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.13	CRPT 237: Develop Staff Assisted Continued Claims Report - Monthly, Daily, Quarterly	16 days	Mon 9/25/23	Mon 10/16/23	
4.14	CRPT 98: Develop STC Summary Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.15	CRPT 115: Develop Untimely First Payment Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.16	CRPT 253: Develop Earnings Weekly, Monthly Determinations by Examiner	16 days	Mon 9/25/23	Mon 10/16/23	
4.17	CRPT 281: Develop Wage Audit Predeterminations Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.18	CRPT 357: Develop Long Term Dated Stops Report	16 days	Mon 9/25/23	Mon 10/16/23	
4.19	CRPT359 Appeals Reversals Weekly Report (323)	31 days	Wed 10/4/23	Wed 11/15/23	
4.2	CRPT360 Appeals Reversals Monthly Report	31 days	Wed 10/4/23	Wed 11/15/23	
4.21	CRPT363 Auto Adjudicated JSR Report	31 days	Wed 10/4/23	Wed 11/15/23	
4.22	CRPT368 Aging Issues Hold Within SOL/No Weeks Requested Report	31 days	Wed 10/4/23	Wed 11/15/23	
4.23	CRPT371 CanceledNonMonPending	31 days	Wed 10/4/23	Wed 11/15/23	
4.24	CRPT02 Analysis of Overpayments by Cause	31 days	Wed 10/4/23	Wed 11/15/23	
4.25	CRPT283 Blocked Claims Issue	31 days	Wed 10/4/23	Wed 11/15/23	
4.26	CRPT354 Automated Wage Update Detail Report	31 days	Wed 10/4/23	Wed 11/15/23	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.27	CRPT355 Automated Wage Update Workflow Report	21 days	Wed 10/18/23	Wed 11/15/23	
4.28	CRPT110 Twelve Month Old Cancellation Claims and Benefits - UBXFIND2605	38 days	Mon 9/25/23	Wed 11/15/23	
4.29	CRPT101 TAA TRA Waivers to Exhaust in 14 days	38 days	Mon 9/25/23	Wed 11/15/23	
4.3	CRPT373 DUA Applications Report	38 days	Mon 9/25/23	Wed 11/15/23	
4.31	CRPT377AD DUA Activity - Applications Denied	38 days	Mon 9/25/23	Wed 11/15/23	
4.32	CRPT113 UC Liabilities Report	38 days	Mon 9/25/23	Wed 11/15/23	
4.33	CRPT377 DUA Activity Report	38 days	Mon 9/25/23	Wed 11/15/23	
4.34	CRPT240 CHECK FOR NEW UI ELIGIBILITY (324)	56 days	Mon 9/25/23	Mon 12/11/23	
4.35	CRPT244 DUA Claims Terminated	56 days	Mon 9/25/23	Mon 12/11/23	
4.36	CRPT250 New Hire Late ADJ Fact-Finding Notifications	56 days	Mon 9/25/23	Mon 12/11/23	
4.37	CRPT263 Unidentified Employer Protest Documents Queue	56 days	Mon 9/25/23	Mon 12/11/23	
4.38	CRPT264 Process Response to Notice of Claim Queue	56 days	Mon 9/25/23	Mon 12/11/23	
4.39	CRPT292 Adjudicator Protest Determination Data Daily	56 days	Mon 9/25/23	Mon 12/11/23	
4.4	CRPT293 Adjudicator Protest Determination Data Weekly	56 days	Mon 9/25/23	Mon 12/11/23	
4.41	CRPT301S Determination Status Report	46 days	Mon 10/9/23	Mon 12/11/23	
4.42	CRPT302 Auto-Adjudication Details	41 days	Mon 10/16/23	Mon 12/11/23	
4.43	CRPT312 Issues Holding Payments (Revised 03/28/2020) CSV	36 days	Mon 10/23/23	Mon 12/11/23	
4.44	CRPT386 Adjudicator Void Weekly CSV	31 days	Mon 10/30/23	Mon 12/11/23	
4.45	CRPT395 Straight DUA Adjudication Timely Payment	31 days	Mon 10/30/23	Mon 12/11/23	
4.46	CRPT282 PRNC Closed Work Items	31 days	Mon 10/30/23	Mon 12/11/23	
4.47	CRPT196 RETRO HOLD REPORT	31 days	Mon 10/30/23	Mon 12/11/23	
4.48	CRPT270 Filed Appeals and Overpayment	31 days	Mon 10/30/23	Mon 12/11/23	
4.49	CRPT271 Disposed Appeals and Overpayment (325)	46 days	Mon 11/6/23	Mon 1/8/24	
4.5	CRPT193 Overpayments Held for Review	46 days	Mon 11/6/23	Mon 1/8/24	
4.51	CRPT197 FALL THROUGH OVERPAYMENTS	46 days	Mon 11/6/23	Mon 1/8/24	
4.52	CRPT261 BPC Appeals Hearing	46 days	Mon 11/6/23	Mon 1/8/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.53	CRPT274 Wage Audit Overpayment Repayment	46 days	Mon 11/6/23	Mon 1/8/24	
4.54	CRPT274F Supplemental Wage Audit Overpayment Repayment CSV	41 days	Mon 11/13/23	Mon 1/8/24	
4.55	CRPT334 Wage Determination Issues Report	41 days	Mon 11/13/23	Mon 1/8/24	
4.56	CRPT361 Earning Overpayments by Overpaid Weeks Report	41 days	Mon 11/13/23	Mon 1/8/24	
4.57	CRPT389F Supplemental Overpayment Report	36 days	Mon 11/20/23	Mon 1/8/24	
4.58	CRPT450 1099G All Generated CSV	36 days	Mon 11/20/23	Mon 1/8/24	
4.59	CRPT451 1099G Status Counts Per Output Type CSV	36 days	Mon 11/20/23	Mon 1/8/24	
4.6	CRPT99 Summary Detail Tax Withholding	36 days	Mon 11/20/23	Mon 1/8/24	
4.61	CRPT230 BTQ Case History Report	36 days	Mon 11/20/23	Mon 1/8/24	
4.62	CRPT231 BAM Case History Report	36 days	Mon 11/20/23	Mon 1/8/24	
4.63	CRPT246 BAM Open Cases	36 days	Mon 11/20/23	Mon 1/8/24	
4.64	CRPT266 BTQ Universe (326)	51 days	Mon 11/27/23	Mon 2/5/24	
4.65	CRPT322 New Hire Fictitious Employers - DOR	46 days	Mon 12/4/23	Mon 2/5/24	
4.66	CRPT116F FPUC Voucher Payment Summary	41 days	Mon 12/11/23	Mon 2/5/24	
4.67	CRPT116L LWA Voucher Payment Summary	41 days	Mon 12/11/23	Mon 2/5/24	
4.68	CRPT265 Protest Benefit Charges Workflow Queue Daily	41 days	Mon 12/11/23	Mon 2/5/24	
4.69	CRPT265D Protest Benefit Charges Workflow Queue	41 days	Mon 12/11/23	Mon 2/5/24	
4.7	CRPT265M Protest Benefit Charges Workflow Queue Monthly	41 days	Mon 12/11/23	Mon 2/5/24	
4.71	CRPT265W Protest Benefit Charges Workflow Queue Weekly	41 days	Mon 12/11/23	Mon 2/5/24	
4.72	CRPT258 QBC Report CSV	41 days	Mon 12/11/23	Mon 2/5/24	
4.73	CRPT05 Benefit Payment Control Cash Offset Activity	36 days	Mon 12/18/23	Mon 2/5/24	
4.74	CRPT11 Claimant Repayment Summary	36 days	Mon 12/18/23	Mon 2/5/24	
4.75	CRPT117 Waiver Status Report	36 days	Mon 12/18/23	Mon 2/5/24	
4.76	CRPT13 Collection Agency Reconciliation Report	36 days	Mon 12/18/23	Mon 2/5/24	
4.77	CRPT139 Repayment Adjustment Detail Report	36 days	Mon 12/18/23	Mon 2/5/24	
4.78	CRPT144 Released Special Voucher Payments	36 days	Mon 12/18/23	Mon 2/5/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.79	CRPT29 Daily Deposit Report (327)	51 days	Mon 12/25/23	Mon 3/4/24	
4.8	CRPT307 Over - Under Counts Report	46 days	Mon 1/1/24	Mon 3/4/24	
4.81	CRPT325 Reconciliation Daily	41 days	Mon 1/8/24	Mon 3/4/24	
4.82	CRPT325W Reconciliation Weekly	41 days	Mon 1/8/24	Mon 3/4/24	
4.83	CRPT33 Debtor Credit Balance Refund Report	41 days	Mon 1/8/24	Mon 3/4/24	
4.84	CRPT35 Deposit Detail Report	41 days	Mon 1/8/24	Mon 3/4/24	
4.85	CRPT35D Deposit Detail Daily Report	41 days	Mon 1/8/24	Mon 3/4/24	
4.86	CRPT91 Refund Status Report	41 days	Mon 1/8/24	Mon 3/4/24	
4.87	CRPT161 Daily REA Productivity Report	41 days	Mon 1/8/24	Mon 3/4/24	
4.88	CRPT161W Weekly REA Productivity Report	36 days	Mon 1/15/24	Mon 3/4/24	
4.89	CRPT392 Certification Amounts and Counts	36 days	Mon 1/15/24	Mon 3/4/24	
4.9	CRPT324 Initial and Continued Claims by County of Residence (Weekly)	36 days	Mon 1/15/24	Mon 3/4/24	
4.91	CRPT326 Initial and Continued Claims by County of Residence (Monthly)	36 days	Mon 1/15/24	Mon 3/4/24	
4.92	CRPT232 Agency New Hire Report	36 days	Mon 1/15/24	Mon 3/4/24	
4.93	CRPT243 Reimbursable Employer Monthly Charge CSV	36 days	Mon 1/15/24	Mon 3/4/24	
4.94	CRPT262 Waiting Week Exemption Report (328)	51 days	Mon 1/22/24	Mon 4/1/24	
4.95	CRPT462 Daily SAVE Productivity Report	46 days	Mon 1/29/24	Mon 4/1/24	
4.96	CRPT400 Effective Date Change (CWC-FE-X Claims)	46 days	Mon 1/29/24	Mon 4/1/24	
4.97	CRPT116 Voucher Payment Summary - UB2152-UB215	46 days	Mon 1/29/24	Mon 4/1/24	
4.98	CRPT192 Payments Held for Review (HDEX) CSV	46 days	Mon 1/29/24	Mon 4/1/24	
4.99	CRPT195 Manual Payments Detail	46 days	Mon 1/29/24	Mon 4/1/24	
4.1	CRPT233 On-demand EFT Deposit Report	46 days	Mon 1/29/24	Mon 4/1/24	
4.101	CRPT257 Failed Document Status After Nightly Batch	46 days	Mon 1/29/24	Mon 4/1/24	
4.102	CRPT269 FL DEBC Payments	41 days	Mon 2/5/24	Mon 4/1/24	
4.103	CRPT228 Time Lapse Statistics	41 days	Mon 2/5/24	Mon 4/1/24	
4.104	CRPT108 TRA Waivers Issued and Revoked Report	41 days	Mon 2/5/24	Mon 4/1/24	
4.105	CRPT194 STC Plan Review Report	41 days	Mon 2/5/24	Mon 4/1/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.106	CRPT272 DUA Irma Payment Detail By Claimant And Week	41 days	Mon 2/5/24	Mon 4/1/24	
4.107	CRPT273 DUA Irma Payment Totals By Claimant And Week	41 days	Mon 2/5/24	Mon 4/1/24	
4.108	CRPT276 Regular RA DUA Related - UCFE, UCX, FL CWC Claims	41 days	Mon 2/5/24	Mon 4/1/24	
4.109	CRPT152 Pre-Certification Details Report (329)	46 days	Mon 2/26/24	Mon 4/29/24	
4.11	CRPT245 UCFE-UCX Pending Monetary After 13 Days	41 days	Mon 3/4/24	Mon 4/29/24	
4.111	CRPT247 FL CWC Reject	41 days	Mon 3/4/24	Mon 4/29/24	
4.112	CRPT248 Out of State (Shell) Claims Reject	41 days	Mon 3/4/24	Mon 4/29/24	
4.113	CRPT249 UCFE AND UCX Reject	41 days	Mon 3/4/24	Mon 4/29/24	
4.114	CRPT251 UCX/UCFE Timely Payment Report	41 days	Mon 3/4/24	Mon 4/29/24	
4.115	CRPT252 Region LWDB02 (Okaloosa Walton) UCX Claims	41 days	Mon 3/4/24	Mon 4/29/24	
4.116	CRPT259 Florida Paying CWC	41 days	Mon 3/4/24	Mon 4/29/24	
4.117	CRPT260 INBOUND IB6 bill	36 days	Mon 3/11/24	Mon 4/29/24	
4.118	CRPT100 Summary of Daily Disbursement Report	36 days	Mon 3/11/24	Mon 4/29/24	
4.119	CRPT118 Weekly Internet Claims Statistics	36 days	Mon 3/11/24	Mon 4/29/24	
4.12	CRPT143 Initial Skills Review Statistics Report	36 days	Mon 3/11/24	Mon 4/29/24	
4.121	CRPT239 Regional Workforce Breakdown of ETA 9129 Regional Workforce Breakdown of ETA 9129	36 days	Mon 3/11/24	Mon 4/29/24	
4.122	CRPT267 FSDEB CSV	36 days	Mon 3/11/24	Mon 4/29/24	
4.123	CRPT275S 13082 Sally DUA Appeals Disposed Report	36 days	Mon 3/11/24	Mon 4/29/24	
4.124	CRPT277 Straight DUA - UCFE, UCX, CWC Claims (330)	51 days	Mon 3/18/24	Mon 5/27/24	
4.125	CRPT279 BIU-Wage Audit Adjudicator Workflow	51 days	Mon 3/18/24	Mon 5/27/24	
4.126	CRPT284 Release HDID Report	51 days	Mon 3/18/24	Mon 5/27/24	
4.127	CRPT285 IB6I BILL STATUS	51 days	Mon 3/18/24	Mon 5/27/24	
4.128	CRPT286 Detailed Untimely/Timely 1st Pay Report	51 days	Mon 3/18/24	Mon 5/27/24	
4.129	CRPT287 Claims That Become Unlocked	51 days	Mon 3/18/24	Mon 5/27/24	
4.13	CRPT288 Issues In-Progress Status Non-SOL Daily Report	51 days	Mon 3/18/24	Mon 5/27/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.131	CRPT289 BIU Appeals Decisions Notices	46 days	Mon 3/25/24	Mon 5/27/24	
4.132	CRPT290 Debit Card Rejects Report	46 days	Mon 3/25/24	Mon 5/27/24	
4.133	CRPT291 Child Support Percentage	46 days	Mon 3/25/24	Mon 5/27/24	
4.134	CRPT294 Pending Monetary CSV	46 days	Mon 3/25/24	Mon 5/27/24	
4.135	CRPT295 All UCO2 generated	46 days	Mon 3/25/24	Mon 5/27/24	
4.136	CRPT296 UC02 Not generated due to Locked Claimants or Claims list	41 days	Mon 4/1/24	Mon 5/27/24	
4.137	CRPT297 UCO2 Status Counts	41 days	Mon 4/1/24	Mon 5/27/24	
4.138	CRPT298 Employers or Agents having more than 100 UCO2s	41 days	Mon 4/1/24	Mon 5/27/24	
4.139	CRPT299 412s Stuck in Pend or Proc (331)	46 days	Mon 4/22/24	Mon 6/24/24	
4.14	CRPT300 Determination Status - 9:00 AM	46 days	Mon 4/22/24	Mon 6/24/24	
4.141	CRPT301 Determination Status - 3:30 PM	46 days	Mon 4/22/24	Mon 6/24/24	
4.142	CRPT303 Adjudicator Quality Nonmon Determinations	46 days	Mon 4/22/24	Mon 6/24/24	
4.143	CRPT304 Outstanding Workflow Items	46 days	Mon 4/22/24	Mon 6/24/24	
4.144	CRPT305 412 Pull Queue report	46 days	Mon 4/22/24	Mon 6/24/24	
4.145	CRPT308 TRA Quarter Activity Counts and Details	46 days	Mon 4/22/24	Mon 6/24/24	
4.146	CRPT309 FIRRE Employer Noncharge Report	41 days	Mon 4/29/24	Mon 6/24/24	
4.147	CRPT310 Reopen After Wait Week Report	36 days	Mon 5/6/24	Mon 6/24/24	
4.148	CRPT311 Collection Agency Exclusion list	36 days	Mon 5/6/24	Mon 6/24/24	
4.149	CRPT313 Work_Items_Closed - Terminated_Daily Report	36 days	Mon 5/6/24	Mon 6/24/24	
4.15	CRPT314 EARN Issues Pending Report CSV	36 days	Mon 5/6/24	Mon 6/24/24	
4.151	CRPT315 ICON Matrix (UCX-UCFE) Report	36 days	Mon 5/6/24	Mon 6/24/24	
4.152	CRPT316 Equifax Inbound FED4 Electronic Responses	36 days	Mon 5/6/24	Mon 6/24/24	
4.153	CRPT317 Staff Handled Monetary Determination and Redeterminations	36 days	Mon 5/6/24	Mon 6/24/24	
4.154	CRPT318 Issue Creation Report (332)	51 days	Mon 5/13/24	Mon 7/22/24	
4.155	CRPT319 Waived Overpayments Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.156	CRPT321 CWAS Queue Month to Month Report	51 days	Mon 5/13/24	Mon 7/22/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.157	CRPT323 New Work Items All Staff Counts Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.158	CRPT327 Payments by County of Residence	51 days	Mon 5/13/24	Mon 7/22/24	
4.159	CRPT328 412 Employer Protest Pending Queue Items Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.16	CRPT329 412 Employer Protest Worked Queue Items Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.161	CRPT330 Appeals Metrics Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.162	CRPT331 Earnings and Remuneration Stuck as Affirmed Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.163	CRPT333 PRNC Priority Items Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.164	CRPT335 Voucher Details	51 days	Mon 5/13/24	Mon 7/22/24	
4.165	CRPT336 ETA-207 Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.166	CRPT337 Workflow Queue Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.167	CRPT339 Taxes Paid on Locked Claims Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.168	CRPT34 Claims Purged Report	51 days	Mon 5/13/24	Mon 7/22/24	
4.169	CRPT340 NDNH New Hire Fictitious Employers Report (333)	46 days	Mon 6/17/24	Mon 8/19/24	
4.17	CRPT341 Wage report for claims requesting monetary reconsideration	46 days	Mon 6/17/24	Mon 8/19/24	
4.171	CRPT343 SIDES Failed Separation Posts	46 days	Mon 6/17/24	Mon 8/19/24	
4.172	CRPT344 SIDES Failed Earnings Verification Posts	46 days	Mon 6/17/24	Mon 8/19/24	
4.173	CRPT345 SIDES Earnings Verification Response Report	46 days	Mon 6/17/24	Mon 8/19/24	
4.174	CRPT347 Benefits by County of Residence Monthly	46 days	Mon 6/17/24	Mon 8/19/24	
4.175	CRPT348 Benefits by County of Residence Annually	46 days	Mon 6/17/24	Mon 8/19/24	
4.176	CRPT349 Civil Court Collections	46 days	Mon 6/17/24	Mon 8/19/24	
4.177	CRPT350 Deceased Claimant Report	41 days	Mon 6/24/24	Mon 8/19/24	
4.178	CRPT364 Daily Reporting Requirement Issues Report	41 days	Mon 6/24/24	Mon 8/19/24	
4.179	CRPT365 SAVE Work authorization Report	41 days	Mon 6/24/24	Mon 8/19/24	
4.18	CRPT366 Lack of Work queue list Report	41 days	Mon 6/24/24	Mon 8/19/24	
4.181	CRPT367 Employer/TPA Login Counts Report	41 days	Mon 6/24/24	Mon 8/19/24	
4.182	CRPT370 CNCL_Adjudication_weekly CSV	41 days	Mon 6/24/24	Mon 8/19/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.183	CRPT372 CNCL_Adjudication_Daily CSV	41 days	Mon 6/24/24	Mon 8/19/24	
4.184	CRPT373S 13082 Sally DUA Application Report (334)	46 days	Mon 7/15/24	Mon 9/16/24	
4.185	CRPT374 DUA Federal Management Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.186	CRPT375 DUA Adjudication Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.187	CRPT375S 13082 Sally DUA Adjudication Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.188	CRPT376 DUA Audit - Payments Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.189	CRPT377S 13082 Sally DUA Activity Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.19	CRPT379 All Cases Assigned by Staff Outside Batch 265	46 days	Mon 7/15/24	Mon 9/16/24	
4.191	CRPT385 Adjudicator Data Determination Weekly CSV	46 days	Mon 7/15/24	Mon 9/16/24	
4.192	CRPT387 Adjudicator Auto Adjudication Weekly CSV	46 days	Mon 7/15/24	Mon 9/16/24	
4.193	CRPT388 DUA_LA_Call_Center_counts	46 days	Mon 7/15/24	Mon 9/16/24	
4.194	CRPT391S 13082 Sally DUA Appeals Filed Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.195	CRPT393 Pre-Certification Amounts and Counts Pre-Certification Amounts and Counts	46 days	Mon 7/15/24	Mon 9/16/24	
4.196	CRPT396 DUA Related Timely Payment	46 days	Mon 7/15/24	Mon 9/16/24	
4.197	CRPT397 Pending DUA Workload Items	46 days	Mon 7/15/24	Mon 9/16/24	
4.198	CRPT399 ETA 207 Validation Report	46 days	Mon 7/15/24	Mon 9/16/24	
4.199	CRPT401 IB4Q Inbound Daily Report (335)	61 days	Mon 7/22/24	Mon 10/14/24	
4.2	CRPT402 FL CWC Recoverable Overpayment Report	61 days	Mon 7/22/24	Mon 10/14/24	
4.201	CRPT403 Apply for PUA Link	61 days	Mon 7/22/24	Mon 10/14/24	
4.202	CRPT404 Expired Claims	61 days	Mon 7/22/24	Mon 10/14/24	
4.203	CRPT405 Exhausted Claims	61 days	Mon 7/22/24	Mon 10/14/24	
4.204	CRPT406 Annual Overpayments Established by Month	61 days	Mon 7/22/24	Mon 10/14/24	
4.205	CRPT407 1720A_Referred	61 days	Mon 7/22/24	Mon 10/14/24	
4.206	CRPT408 1720B_Not_Referred	61 days	Mon 7/22/24	Mon 10/14/24	
4.207	CRPT409 1720C_Written_Off_Waived	61 days	Mon 7/22/24	Mon 10/14/24	
4.208	CRPT40DD DUA Financial Daily - Straight DUA	61 days	Mon 7/22/24	Mon 10/14/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.209	CRPT40DR DUA Financial Daily - Related DUA	61 days	Mon 7/22/24	Mon 10/14/24	
4.21	CRPT40MD DUA Financial Monthly - Straight DUA	61 days	Mon 7/22/24	Mon 10/14/24	
4.211	CRPT40MR DUA Financial Monthly - Related DUA	61 days	Mon 7/22/24	Mon 10/14/24	
4.212	CRPT40QD DUA Financial Quarterly - Straight DUA	61 days	Mon 7/22/24	Mon 10/14/24	
4.213	CRPT40QR DUA Financial Quarterly - Related DUA	61 days	Mon 7/22/24	Mon 10/14/24	
4.214	CRPT40WR DUA Financial Weekly - Related DUA (336)	56 days	Mon 8/26/24	Mon 11/11/24	
4.215	CRPT41 DUA-UI-ISSUES	56 days	Mon 8/26/24	Mon 11/11/24	
4.216	CRPT410 Corrected Earnings Report for Auto Requested Weeks	56 days	Mon 8/26/24	Mon 11/11/24	
4.217	CRPT411 Workflow SCIN Productivity	56 days	Mon 8/26/24	Mon 11/11/24	
4.218	CRPT412 Workflow SCIN New and In Progress	56 days	Mon 8/26/24	Mon 11/11/24	
4.219	CRPT413 Workflow SCIN Backlog	56 days	Mon 8/26/24	Mon 11/11/24	
4.22	CRPT414 Workflow Returned Mail Productivity	56 days	Mon 8/26/24	Mon 11/11/24	
4.221	CRPT415 Workflow Returned Mail New and In Progress	56 days	Mon 8/26/24	Mon 11/11/24	
4.222	CRPT416 Workflow Returned Mail Backlog	41 days	Mon 9/16/24	Mon 11/11/24	
4.223	CRPT417 Claimants_PEUC_NO_Weeks CSV	41 days	Mon 9/16/24	Mon 11/11/24	
4.224	CRPT418 Claimants_PUA_NO_Weeks CSV	41 days	Mon 9/16/24	Mon 11/11/24	
4.225	CRPT419 RA_Mon_Eligible_No_Weeks CSV	41 days	Mon 9/16/24	Mon 11/11/24	
4.226	CRPT420 Claim Counts by FIRRE State Montly Report	41 days	Mon 9/16/24	Mon 11/11/24	
4.227	CRPT423 Debit Card Payment Recovery	41 days	Mon 9/16/24	Mon 11/11/24	
4.228	CRPT424 State_And_Federal_Program_(RA, PEUC, EB, PUA) Payments CSV	41 days	Mon 9/16/24	Mon 11/11/24	
4.229	CRPT424F Supplemental_(FPUC, LWA, MEUC, WW)_Payment CSV (337)	46 days	Mon 10/7/24	Mon 12/9/24	
4.23	CRPT425 PEGA Unregistered Claim Count	46 days	Mon 10/7/24	Mon 12/9/24	
4.231	CRPT426 ALM99228_RFI_First Payments Prod	46 days	Mon 10/7/24	Mon 12/9/24	
4.232	CRPT427 RFI_ALM99322_Pega_Claims_Count	46 days	Mon 10/7/24	Mon 12/9/24	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.233	CRPT428 Open EIRP Workflow Items CSV	46 days	Mon 10/7/24	Mon 12/9/24	
4.234	CRPT429 Daily Report of Ingested Pega Claims to CONNECT CSV	46 days	Mon 10/7/24	Mon 12/9/24	
4.235	CRPT430 COVID-19 Adjudication report CSV	46 days	Mon 10/7/24	Mon 12/9/24	
4.236	CRPT431 COVID-19 Appeals Filed report	46 days	Mon 10/7/24	Mon 12/9/24	
4.237	CRPT432 COVID-19 Appeals Disposed report	41 days	Mon 10/14/24	Mon 12/9/24	
4.238	CRPT433 COVID-19 Applications report CSV	41 days	Mon 10/14/24	Mon 12/9/24	
4.239	CRPT434 TFS94377_firre_rfi	36 days	Mon 10/21/24	Mon 12/9/24	
4.24	CRPT437 Debit Card list for Communication	36 days	Mon 10/21/24	Mon 12/9/24	
4.241	CRPT438 Pending Monetary Managment Workflow Queue	36 days	Mon 10/21/24	Mon 12/9/24	
4.242	CRPT439 Open and Pend CWAS Workflows	36 days	Mon 10/21/24	Mon 12/9/24	
4.243	CRPT441 1099G Summary Report	36 days	Mon 10/21/24	Mon 12/9/24	
4.244	CRPT444 UC_Benefit_Payments CSV (338)	51 days	Mon 10/28/24	Mon 1/6/25	
4.245	CRPT452 1099G Amount For Each Claimant CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.246	CRPT453 49T All Generated CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.247	CRPT454 49T Status Counts Per Output Type CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.248	CRPT455 49T Amount Greater Than \$1 CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.249	CRPT457 SOL Wage Issues Report CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.25	CRPT458 Supplemental (FPUC, LWA, MEUC, WW) Payments Issued on Locked Claims	51 days	Mon 10/28/24	Mon 1/6/25	
4.251	CRPT459 Overpayments Eligible for Collection Agency Referral	51 days	Mon 10/28/24	Mon 1/6/25	
4.252	CRPT462W Weekly SAVE Productivity Report	51 days	Mon 10/28/24	Mon 1/6/25	
4.253	CRPT59 Manual Charge Relief Report	51 days	Mon 10/28/24	Mon 1/6/25	
4.254	CRPT72 NM QIP SATA - MONTHLY	51 days	Mon 10/28/24	Mon 1/6/25	
4.255	CRPT79F Supplemental Overpayments Established for the Month CSV	51 days	Mon 10/28/24	Mon 1/6/25	
4.256	CRPT85 Processed Cancelled and Replacement Payments DATETIME	51 days	Mon 10/28/24	Mon 1/6/25	
4.257	CRPT874 ALM109874_RFI_ETA539	51 days	Mon 10/28/24	Mon 1/6/25	

WBS	Task Name	Duration	Start	Finish	Predecessors
4.258	CRPT92 Reissue Payment -UB2681-RQLST	51 days	Mon 10/28/24	Mon 1/6/25	
4.259	CRPT93 Report of Good/Not Good Job Prospects_SRR (339)	46 days	Mon 12/2/24	Mon 2/3/25	

IV. Project Spending Plan

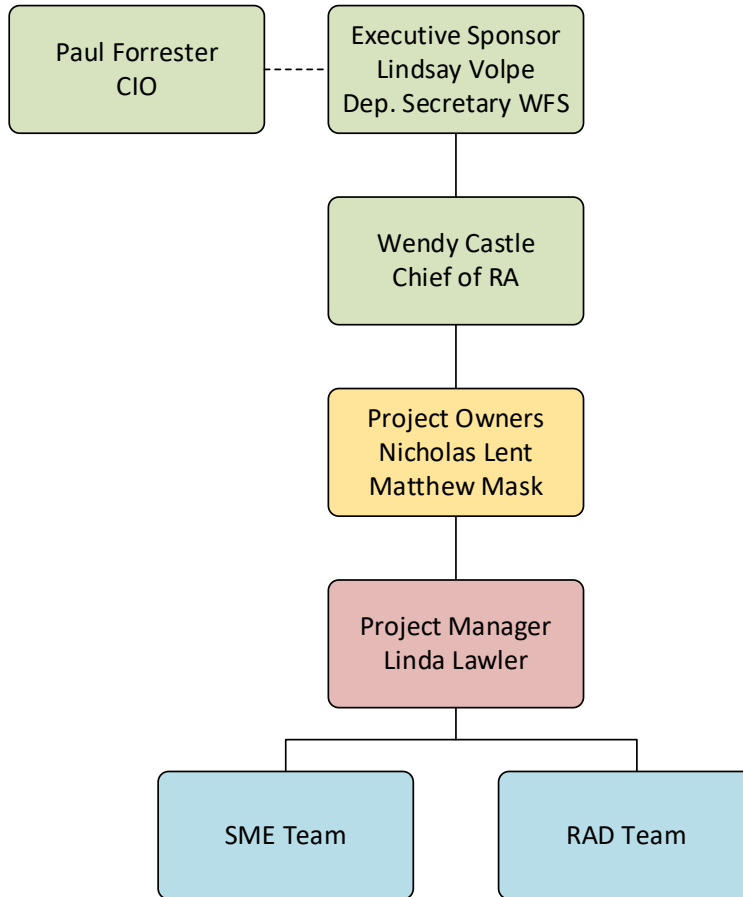
The Reports Project uses existing operational resources, therefore there is no project spend.

FY 2021-22 Expenditures	FY 2022-23 Expenditures
<i>Software: 0.00</i>	<i>Software: 0.00</i>
<i>Other OpEx (Vendor Deliverables): 0.00</i>	<i>Other OpEx (Vendor Deliverables): 0.00</i>
<i>Other CapEx: \$0.00</i>	<i>Other CapEx: 0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart

The organizational chart for the reporting project is shown below.



(Note: RAD is not an acronym, it's a name chosen by the team which is normal Agile practice.)

B. Project Roles and Responsibilities

The table below shows those assigned to roles on this project.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 Work Group	<ul style="list-style-type: none"> • Responsible for the Strategy of the Department IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Nicolas Lent, Matthew Mask	Project Owners	<ul style="list-style-type: none"> • 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
Linda Lawler	Project Manager	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • Evaluates the business need for reports • Contributes subject matter expertise • Prioritizes reports
RAD Team	Data Engineers	<ul style="list-style-type: none"> • Breaks requirements documents into product backlog items • Redesigns reports for the data warehouse

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> Converts crystal reports to data warehouse reports

C. Project Management Methodology

The Department 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 the Department’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. The Department believes strong project management is critical throughout the life of any successful project.

For this project, the Department’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 the Department 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 Department Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- The Department’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.

The Department 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

There have not been any identified needs on the Reports project since there are no changes to business processes.

VII. Project Risk Management Plan

Risks are evaluated and handled in weekly RAID meeting for socialization and, if necessary, resolution.

NOTE: This section will align with the Program Management Plan’s RMP and should be updated every month as risks change and are updated. Risks are maintained on a regular basis within Service Now. Weekly RAID review meetings are held with senior leadership present.

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 PRODUCT & DATA MANAGEMENT

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

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10/11/2023

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SECTION 1 — OVERALL PROJECT PLAN

I. *Project Charter*

FloridaCommerce is seeking to manage the complexity of data growth within the Reemployment Assistance Claims and Benefits Information System.

Managing the complexity of data growth calls for a data growth management strategy for continuous system maintenance and support, including determining the optimal profile or size (current system size is 388T); monitoring storage usage, hardware resources, and database performance; understanding growth management challenges and testing strategies; and understanding space management.

Formal structures and strategies for managing, archiving, and purging data enables the Department to better ensure the availability, security, and integrity of the System.

The approach must adhere to enterprise data management policies, procedures, and standards and will be dependent on operational efforts in that area.

A. **Scope Statement**

While identification of targets for scope are still in progress, the following will be included:

In Scope

- Review of RFI responses for an archiving and purging tool in collaboration with Information Technology’s ongoing efforts for enterprise data management tools. This includes procurement of a tool if enterprise efforts do not include archiving and purging functionality.
- UI Development in support of the initial archiving and purging effort, regardless of whether it is in assistance of a selected tool or a tool that is developed custom (in-house knowledge and expertise is *critical* for success). This includes development in support of applications critical to the function of the System (FileNet for example).
- Development of scripts that assist with identification of data and refinement of business rules that further increase the amount of data that can be archived and purged. This will contribute to identification of levels of data storage that are within the Department’s maintenance budget.
- Evaluation of data stores not necessarily directly tied to the System but included in the mapping of Business Unit Products and Services.
- Mapping of Business Unit (BU) products and Services to data and related storage items
 - Triggers that create the need for products and services
 - Support information necessary for identified products and services, (defining what is “active data”),
 - Support information necessary for research, analysis, records requests, and reports (“archival data”).
 - Identification of data that archived.
 - Identification of data that can be purged and the information necessary to follow the Records Management processes for purging
 - Comparison to existing records retention schedules to determine updates to records management schedules.
 - Creation or improvement of processes to evaluate requests for storing information not contained in mapping documentation.

- Development of or configuration of a tool that will perform regularly scheduled archiving of data in accordance with business unit requirements.
- Development of or configuration of a tool and a process that will perform regularly scheduled purging of data in accordance with business requirements and Records Management policies and procedures.
- Environments that support the System that include System data. This includes production, testing, development, and DR environments for the System and for applications critical to System function.
- Training for business unit staff pending the identification of a tool and whether the tool is part of the enterprise data management effort or if it is part of Product and Data Management.
- The ability to track and report System data growth if not included in enterprise tools for data management.

Out of Scope

- Externally hosted vendor applications that contain Workforce Services data (for example, ImageAPI)
- Analysis and report data in the FloridaCommerce data warehouse
- SharePoint applications or local databases that are offshoots of the System.
- Enterprise Data Governance and Data Management except where Workforce Services input is requested during collaboration.
- Updates to record retention schedules. (This will likely be an enterprise initiative or done separately by business units outside of this project.)

B. Project Objectives and Business Benefits

The success of the Department’s archival and purge process is dependent on improvements to the System’s data management and operational schema. The data contained in that schema is data vital to the operation of the System; however, some of this data can be archived and purged.

This initiative identifies information necessary in support of products and services provided to the Department’s customers so that the lifecycle of data can be managed from active status to the ability to automate archive and purge functions on a schedule.

The project team will collaborate with efforts for data management at an enterprise level so that it follows enterprise data management policies and procedures.

Project Objective	Business Benefit
Reduction in the size of the existing System data by purging unnecessary data and by archiving inactive data to cheaper, archival storage.	<ul style="list-style-type: none"> • Ensures the ability to maintain the Reemployment Assistance Program as it continuously ingests and stores new data. • Reduces the cost of active data storage. • Reduces risk of inadvertent exposure of claimant data • Enhances the ability, efficiency, and scalability in response to disasters
Regularly scheduled archiving and purging of System data	<ul style="list-style-type: none"> • Establishes and maintains manageable data storage levels. • Maintains low level of risk of exposure by purging data that no longer adds value.

Project Objective	Business Benefit
Purchase or establishment of a tool to manage data storage with the ability to measure performance and forecast future data storage costs.	<ul style="list-style-type: none"> Ability to forecast storage levels and costs for Reemployment Assistance as part of enterprise strategic planning and budgeting.
Mapping of Workforce Services information from the System to data storage throughout its lifecycle	<ul style="list-style-type: none"> Documentation to support justification for use of data and storage per Workforce Services responsibilities. Adherence to Department enterprise data management standards and practices to improve data integrity and successfully respond to audit requests. Ease of maintenance and tracking of business unit's data inventories
Creation of or improvement to business units' evaluation of the use of data and its justification for storage	<ul style="list-style-type: none"> Ensures that data stored has a defined purpose and value. Reduction in storage costs by eliminating data when storage costs exceed their value. Improved data integrity by documenting relationships of data items in a user-friendly manner and by identifying items shared across multiple business units
Improved performance and ability to support the active system	<ul style="list-style-type: none"> Reduction in batch processing times and environment refreshes Reduced duration of maintenance windows and production releases Increased efficiency in Disaster Recovery Readiness Reduced risk in performing operational patching, security updates, metadata updates, etc.

C. Critical Success Factors

The following measures will be used to determine the success of the project. These may be updated once the scope is approved:

- Before and After measures of System active data and storage costs
- Establishment of an archival system and associated costs
- Measure of batch processing duration before and after archiving and purging, including times of high volumes (for example, quarterly and annual batch processing)
- Before and after measures of environment refresh rates including preparation for disaster recovery
- At least one quarter of historical reports or dashboards showing historical tracking of data storage size.
- Documentation or a system that documents and maintains a data dictionary, includes justification for data usage, and identifies and users of the business unit's data.
- Process Improvement measures or creation of processes for evaluation of new data items and their use.

- Risk reduction costs before and after the reduction of data in the active system

D. Key Dates

Key Dates will be established once scope is finalized and approved.

Key Date	Importance and Relevance to the Project
TBD	

E. Major Deliverables

Major project deliverables are listed below.

Major Deliverable	Deliverable Description
Project Kickoff Meeting	This will be scheduled to “restart” the project and to establish urgency
Project Management Plan	Collection of documents related to scope, schedule, and cost.
Project Workgroup Meetings	Project workgroup meetings are designed to hash out technical requirements/solutions to meet business needs. There will also be business workgroup meetings for requirements gathering and refinement. These meetings exclude executive management so the project team can freely discuss issues and risks.
Project Status Meetings	Usually less than 15-minutes, these meetings are for executive management to update them on project progress and to answer any questions.
SharePoint site for Project Information	Requests for access should be submitted to the Project Manager
Products	<ul style="list-style-type: none"> • Archival System (with coordination of Enterprise Data Management) • Reemployment Assistance Business Unit Products, Services, and Data Usage Catalog • Functional Requirements Documents that identify business rules for archiving and purging data. • Benefits Realization Measures
Transition Plans	<ul style="list-style-type: none"> • Confirmation of support FTEs to transition maintenance of project deliverables. • User Friendly Data Dictionary and Maintenance (with coordination of Enterprise Data Management) • Archive and Purge functionality maintenance and support (with coordination of Enterprise Data Management) • Business Process Documentation for New Data Evaluation maintenance and support
Project Closeout Report	Documentation of completion of project deliverables and accomplishments.

F. Major Milestones

Priority of tasks is still being established by the PM with IT and the Project Owner. Therefore, the schedule, including Milestones, etc. will be included in the October OWP.

Major Milestone	Deliverable Description
Project Kickoff Meeting	This will be scheduled to “restart” the project and to establish urgency
Project Management Plan	Collection of documents related to scope, schedule, and cost.
Project Workgroup Meetings	Project workgroup meetings are designed to hash out technical requirements/solutions to meet business needs. There will also be business workgroup meetings for requirements gathering and refinement. These meetings exclude executive management so the project team can freely discuss issues and risks.
Project Status Meetings	Usually less than 15-minutes, these meetings are for executive management to update them on project progress and to answer any questions.
Creation of Products	<ul style="list-style-type: none"> • Archival System (with coordination of Enterprise Data Management) • Reemployment Assistance Business Unit Products, Services, and Data Usage Catalog • Functional Requirements Documents that identify business rules for archiving and purging data. • Benefits Realization Measures
Transition Plans	<ul style="list-style-type: none"> • Confirmation of support FTEs to transition maintenance of project deliverables. • User Friendly Data Dictionary and Maintenance (with coordination of Enterprise Data Management) • Archive and Purge functionality maintenance and support (with coordination of Enterprise Data Management) • Business Process Documentation for New Data Evaluation maintenance and support
Project Closeout Report	Documentation of completion of project deliverables and accomplishments.

G. Key Stakeholders

The product deliverables in this initiative are critical to the people listed below.

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Florida Department of Commerce
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

Key Stakeholder	Project Interest
Wendy Castle	Modernization Program Owner – Business
Mark Miller	Project Owner, Chief of RA Operations
Nicole Sanislow	Modernization Program Manager – Business
Tom Richardson	Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	Modernization Program Manager – Information Technology
Linda Lawler	Project Manager

H. Significant Project Assumptions and Constraints

This initiative requires a high level of business knowledge:

- Knowledge and experience in Workforce Services business practices
- Knowledge and experience of USDOL business rules and requirements for maintaining the Reemployment Assistance Federal Program
- Knowledge of the data used to measure Florida’s data quality and timeliness.
- Knowledge of best practices in data management and governance

Therefore, the lists below are not to be considered comprehensive.

Project Assumptions

1. The identified requirements are correct and complete or will be by the end of the project.
2. The assigned project 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. Funding will be available for necessary procurements, if any.
7. Discoveries related to data sources, integrity and other concerns will be communicated to the program workgroup for discussion and next steps as soon as possible after discovery.

Project Constraints

1. Limited human resources available with institutional knowledge of the reemployment assistance program
2. A completion date of June 30, 2024.

II. Work Breakdown Structure

The project schedule is in the early stages of development. This work breakdown structure is subject to change until a final schedule can be reviewed and approved.

WBS	Task Name
0	Product and Data Management
1	Project Management
1.1	Discovery/Initiation
1.1.1	4.1 Project Charter Creation
1.1.2	13.1 Identification of Stakeholders
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	7.1 Plan Cost Management
1.2.12	7.2 Estimate Costs
1.2.13	7.3 Determine Budget
1.2.14	8.1 Plan Quality Management
1.2.15	9.1 Plan Resource Management
1.2.16	9.2 Estimate Activity Resources
1.2.17	10.1 Plan Communications Management
1.2.18	11.1 Plan Risk Management
1.2.19	11.2 Identify Risks
1.2.20	11.3 Perform Qualitative Risk Analysis
1.2.21	11.4 Perform Quantitative Risk Analysis
1.2.22	11.5 Perform Risk Responses
1.2.23	12.1 Plan Procurement Management
1.2.24	13.2 Plan Stakeholder Engagement
1.3	Executing
1.3.1	4.3 Direct and Manage Project Work
1.3.2	4.4 Manage Project Knowledge
1.3.3	8.2 Manage Quality
1.3.4	9.3 Acquire Resources
1.3.5	9.4 Develop Team
1.3.6	9.5 Manage Team
1.3.7	10.2 Manage Communications
1.3.8	11.6 Implement Risk Response

WBS	Task Name
1.3.9	12.2 Conduct Procurements
1.3.10	13.3 Manage Stakeholder Engagement
1.4	Monitor & Control
1.4.1	4.5 Monitor & Control Project Work
1.4.2	4.6 Perform Integrated Change Control
1.4.3	5.5 Validate Scope
1.4.4	5.6 Control Scope
1.4.5	6.6 Control Schedule
1.4.6	7.4 Control Costs
1.4.7	8.3 Control Quality
1.4.8	9.6 Control Resources
1.4.9	10.3 Monitor Communications
1.4.10	11.7 Monitor Risks
1.4.11	12.3 Control Procurements
1.4.12	13.4 Manage Stakeholder Engagement
1.5	Closing
1.5.1	4.7 Control Project or Phase
2	Discovery of Business Rules
2.1	Discovery of Use of Information
2.1.1	Archive & Purge Current State/Business Rules
2.1.2	Document What Information is Used Where
3	Archiving & Purging of Data
3.1	Testing and Refinement of Business Rules
3.1.1	Create Initial Hypothesis for Business Rules Collected
3.1.2	Refinement of Business Rules
3.1.3	Testing of Adjusted Hypothesis
3.1.4	Completion of Archiving Business Rules Functional Requirements Document
3.1.5	Completion of Purging Business Rules Functional Requirements
3.1.6	Share Archive & Purge Functional Requirements Documents with Enterprise Data Management
4	Solution Measures
4.1	Identify Pre & Post Performance Measurements
4.2	Identify Pre & Post Size Measurements
4.3	Identify Pre & Post Cost Measurements
4.4	Identify Pre & Post Risk Costs
4.5	Create Pre Archive & Purge Costs Report
4.6	Create Post Archive & Purge Results Report
4.7	Create Maintenance and Performance Measures / Data Management Plan
5	Transition to Operations

WBS	Task Name
5.1	Identify Maintenance Team
5.2	Train Team on Maintenance and Performance Measures/Data Management Plan
5.3	Track Maintenance and Performance Measures/Data Management Plan Execution
5.4	Approve Final Transition to Maintenance Team

III. Resource Loaded Project Schedule

Task identification, prioritization, and resource assignments are in progress. When completed they will be included in this document.

IV. Project Spending Plan

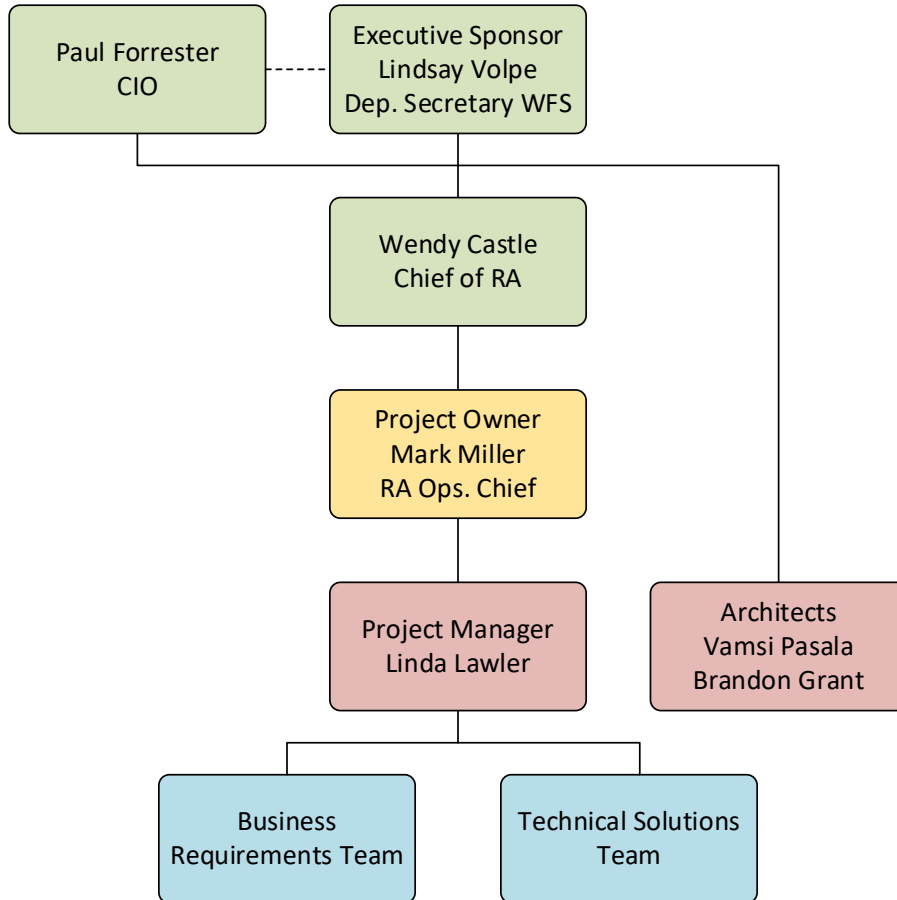
The project budget has not been identified at this time.

FY 2021-22 Expenditures	FY 2022-23 Expenditures
<i>Software: \$0.00</i>	<i>Software: \$0.00</i>
<i>Other OpEx (Vendor Deliverables): \$0.00</i>	<i>Other OpEx (Vendor Deliverables): \$0.00</i>
<i>Other CapEx: \$0.00</i>	<i>Other CapEx: 0.00</i>

V. Project Organization and Methodology

A. Project Organizational Chart

This chart will be flushed out further pending resource additions in the development and database areas.



B. Project Roles and Responsibilities

The resources listed below are necessary for success of this initiative.

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Provide guidance on overall strategic direction including collaboration on enterprise data initiatives such as Master Data Management • 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	<ul style="list-style-type: none"> • 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 Work Group	<ul style="list-style-type: none"> • Responsible for the Strategy of the Department IT • Responsible for Staffing and Support plans • Responsible for day-to-day operations • Responsible for working closely with programs on technology needs
Mark Miller	Project Owner/Director of Reemployment Assistance Operations	<ul style="list-style-type: none"> • Contributes subject matter expertise and resources needed from each business unit • 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

Name	Project Role	Responsibility
Linda Lawler	Project Manager	<ul style="list-style-type: none"> 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
Nicole Cain	Project Manager	<ul style="list-style-type: none"> Assists in refinement of existing business rules for archiving and purging data Works with business units to answer questions and identify risks related to archiving and purging data. Provides assistance as needed in legal evaluation of business rules and requirements
Vamsi Pasala/ Brandon Grant	Architect and Technical Lead	<ul style="list-style-type: none"> 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 and any dependencies/impacts of other projects Assists the PM in coordinating additional technical resources/SMEs if necessary, for the team.
Business Requirements Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> 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 Assists the Project Managers in responding to risks and issues Assists the Project Manager in evaluating change requests
Technical Solutions Team	Infrastructure and Data Experts	<ul style="list-style-type: none"> Contributes subject matter expertise Completes assigned project tasks in accordance with the Project Schedule Identifies risks and issues to the Project Managers Assists the Project Managers in responding to risks and issues Assists the Project Manager in evaluating change requests

C. Project Management Methodology

The Department 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 the Department'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. The Department believes strong project management is critical throughout the life of any successful project.

For the Product and Data Management project, the Department'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 the Department 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 Department Project Manager.
- At the end of the contract, vendors will provide final copies of all reports in electronic format for archive purposes.
- The Department'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.

The Department 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

Identification of the need for Business Organizational Change Management is in progress. Additional information will be provided in the near future.

This project intends to improve the delivery, execution, security, or convenience of the Department'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

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
1. Project scope is not clearly defined	High	Low	Communicate proposed scope to the Work Group for evaluation and a decision	Linda Lawler
2.				
3.				
4.				
5.				

VIII. Capacity Plan

Resource needs are being identified as the project scope and task prioritization is more clearly defined. Capacity Planning will be provided in future operational work plans.



**OPERATIONAL WORK PLAN
FOR
ADJUDICATION WORKFLOW
MANAGEMENT SYSTEM**

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

**FISCAL YEAR 2023-2024
QUARTER 1
PREPARED ON OCTOBER 9, 2023**

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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., COTS, GOTS, and/or custom software development), procure and implement the solution.

In Scope

- Determine problem statement and requirements.
- Streamline existing business processes & identify opportunities for automation.
- Design a technical solution (e.g., COTS, in-house development, combination)
- Perform buy vs in-house development analysis.
- FloridaCommerce make decision.
- Procure and implement solution.

Out of a Scope

- Continuing to use Reconnect as the system of record.

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., APIs, import/export, batch file transfer, etc.)	<ul style="list-style-type: none"> • 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
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.)	<p>create an increase in the number of claims that may be processed daily.</p> <ul style="list-style-type: none"> • 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 FloridaCommerce leadership to measure adjudication process.
Automate the current manual workaround for assignment of work and quickly allow for redistribution of work.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • 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

Project Objective	Business Benefit
Identify the reports required to meet FloridaCommerce management goals (dashboards, metrics, workload reports, assignment reports, priority reports, etc.)	<ul style="list-style-type: none"> assist adjudication leadership with monitoring and reporting on adjudication performance metrics and dashboard for FloridaCommerce 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

- FloridaCommerce making a buy vs build decision in a timely manner.
- FloridaCommerce conducting the procurement process efficiently.
- 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.
- Sufficient FloridaCommerce Application Development staff available to build the product within the provided timeframe if the decision is to build.
- 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 To Be Determined

Key Date	Importance and Relevance to the Project

E. Major Deliverables To Be Determined

Major Deliverable	Deliverable Description

F. Major Milestones To Be Determined

Major Milestone	Milestone Description

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department Commerce
Lindsay Volpe	Deputy Secretary, Workforce Services
Domenic DiLullo	Chief Technology Officer
Paul Forrester	Chief Information Officer, Program Owner- Information Technology
Tisha Womack	Chief Financial Officer

Wendy Castle	RA Modernization Program Owner – Business
Nicole Sanislow	RA Modernization Program Manager – Business
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
Thomas Holliday	RA Modernization Program Manager – Strategic Planning Office
Sushma Kavarthapu	RA Modernization Program Manager – Information Technology
Johnathan Hill	Project Owner
Clara Kendrick	Project Manager

H. Significant Project Assumptions and Constraints

Project Assumptions

1. FloridaCommerce will make a buy vs build decision in a timely manner.
2. FloridaCommerce will conduct the procurement process efficiently and there will be no delays to obtaining a COTs product.
3. 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 Application Development staff available to build the product within the provided timeframe if the decision is to build.
5. 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

To be determined.

III. Resource Loaded Project Schedule

To be determined.

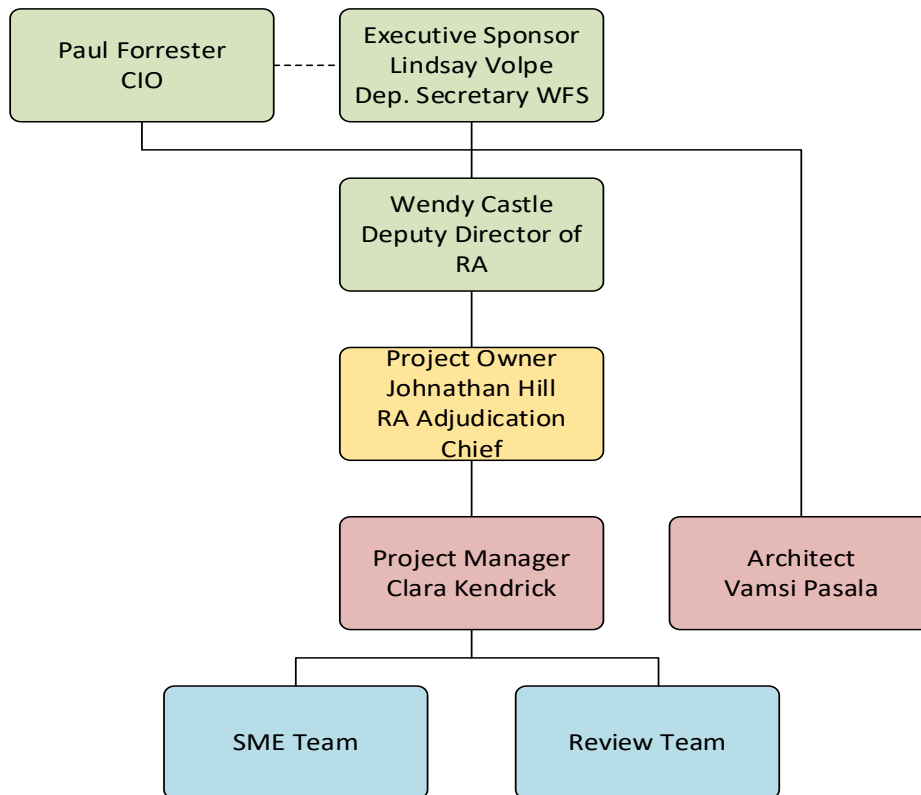
IV. Project Spending Plan

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



B. Project Roles and Responsibilities

Name	Project Role	Responsibility
Lindsay Volpe	Executive Sponsor	<ul style="list-style-type: none"> Provide guidance on overall strategic direction

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	Deputy Director of RA Program Owner	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
Johnathan Hill	Project Owner/RA Adjudication Chief	<ul style="list-style-type: none"> • 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

Name	Project Role	Responsibility
Clara Kendrick	Project Manager	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Name	Project Role	Responsibility
Review Team	Documentation Reviewers	<ul style="list-style-type: none"> • 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

This project will follow the [Risk Management Plan](#), captured within the Reemployment Assistance Program Management Plan. The Reemployment Assistance Modernization Program team follows a standard method for logging and categorizing issues, researching solutions, and communicating options and final recommendations. Project team members should actively contribute, as it is critical to timely decisions and moving past roadblocks. The buy-in of the project team, key team members and technical staff is critical to the success and ensures that the project team delivers a product in line with the project goals.

Key activities of the risk management process include:

- **Risk Identification** – Identifying risks that could potentially impact the project.
- **Risk Analysis** – Prioritize risks and assess the probability and consequence of the risk.
- **Risk Response Planning** – Prepare action plans to enhance opportunities or minimize threats to the program.
- **Risk Monitoring** – Execute action plans and evaluate their effectiveness, tracking, and reviewing residual risks and identifying new risks.

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

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

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
APPEALS WORKFLOW MANAGEMENT
SYSTEM**

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

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10/12/2023

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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. Additionally, the System allows employers to grant TPAs access to perform specific administrative functions.

The current Appeals Workflow Management System is a collection of functions and features inside the System. Being built over a decade ago, the System and the functions and features that comprise the Appeals Workflow Management System are in need of modernization.

A. **Scope Statement**

In Scope

- All appropriated, budgeted, and approved tasks necessary to implement the Appeals Workflow Management System.
- 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	<ol style="list-style-type: none">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 to claimants and the increased goodwill that would result.
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C. Critical Success Factors

The work to improve the existing Appeals Workflow Management System will most likely 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. Our resources are shared across multiple projects, so maintaining an accurate project schedule, accurately forecasting resource requirements, and accurately forecasting dates and durations will be critical to correctly allocating resources.

D. Key Dates

Key Dates (anticipated)	Importance and Relevance to the Project
10/18/2023	Initiation Phase Ends
10/30/2023	Planning Phase Ends
10/30/2023	Execution Phase Starts
6/29/2024	Project Ends

E. Major Deliverables

8/25/2023	Deliverable 1: Project Kick-Off Meeting
10/20/2023	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	In progress
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, Florida Department of Commerce
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
Tom Richardson	Modernization Program Manager – Strategic Planning Office
Thomas Hoverman	Organizational Change Management Lead
Christian Stephens	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, could not be replaced with equivalent expertise in the time required.
- End date of 6/30/2024 cannot be moved.

II. Work Breakdown Structure

WBS	Task Name	Duration	Com	Start	Finish
1	AWMS ... START	243.5 days	17%	Mon 8/14/23 8:00 AM	Fri 7/26/24 12:00 PM
1.1	Before the project became a project	16 days	100%	Mon 8/14/23 8:00 AM	Tue 9/5/23 5:00 PM
1.2	Initiation	31 days	92%	Tue 9/5/23 5:00 PM	Wed 10/18/23 5:00 PM
1.2.1	Risk and Complexity Assessment	18 days	100%	Tue 9/5/23 5:00 PM	Fri 9/29/23 5:00 PM
1.2.2	Stakeholders Register	9 days	100%	Mon 9/18/23 5:00 PM	Fri 9/29/23 5:00 PM
1.2.3	Deliverable: Project Charter	14 days	96%	Mon 9/25/23 5:00 PM	Fri 10/13/23 5:00 PM
1.2.4	Project Kickoff Meeting	2 days	100%	Mon 9/25/23 5:00 PM	Wed 9/27/23 5:00 PM
1.2.5	Conduct Lessons Learned Meeting	3 days	0%	Fri 10/13/23 5:00 PM	Wed 10/18/23 5:00 PM
1.2.6	Initiation Phase complete	0 days	0%	Wed 10/18/23 5:00 PM	Wed 10/18/23 5:00 PM
1.3	Planning	39 days	64%	Tue 9/5/23 5:00 PM	Mon 10/30/23 5:00 PM
1.3.1	Planning Phase Start	0 days	0%	Wed 10/18/23 5:00 PM	Wed 10/18/23 5:00 PM
1.3.2	Deliverable: Resource Plan	6 days	30%	Wed 10/18/23 5:00 PM	Thu 10/26/23 5:00 PM
1.3.3	Deliverable: Project Schedule - First Full Draft	4 days	100%	Mon 9/25/23 5:00 PM	Fri 9/29/23 5:00 PM
1.3.4	Deliverable: Project Management Plan	15 days	62%	Fri 9/29/23 5:00 PM	Fri 10/20/23 5:00 PM
1.3.5	Deliverable: Project Budget	3 days	100%	Mon 9/25/23 5:00 PM	Thu 9/28/23 5:00 PM
1.3.6	Deliverable: Project Spending Plan	13 days	80%	Thu 9/28/23 5:00 PM	Tue 10/17/23 5:00 PM
1.3.7	Complete Impact Analysis	1 day	0%	Fri 10/27/23 8:00 AM	Fri 10/27/23 5:00 PM
1.3.8	Requirements	38 days	61%	Tue 9/5/23 5:00 PM	Fri 10/27/23 5:00 PM
1.3.9	Complete the Planning Gate R&C Assessment	1 day	0%	Mon 10/30/23 8:00 AM	Mon 10/30/23 5:00 PM
1.4	Planning Phase Complete	0 days	0%	Mon 10/30/23 5:00 PM	Mon 10/30/23 5:00 PM
1.5	Execution	193 days	0%	Tue 10/24/23 12:00 PM	Fri 7/26/24 12:00 PM
1.5.1	Execution Phase Start	0 days	0%	Mon 10/30/23 5:00 PM	Mon 10/30/23 5:00 PM
1.5.2	Prepare Operations and Maintenance Plan (only required for Level 2-4 projects)	5 days	0%	Tue 10/31/23 8:00 AM	Mon 11/6/23 5:00 PM
1.5.3	Required Project Development	188 days	0%	Tue 10/24/23 12:00 PM	Fri 7/19/24 12:00 PM
1.5.4	Conduct Lessons Learned Meeting	5 days	0%	Fri 7/19/24 12:00 PM	Fri 7/26/24 12:00 PM
1.6	Execution Phase complete	0 days	0%	Fri 7/26/24 12:00 PM	Fri 7/26/24 12:00 PM
1.7	Monitoring and Controlling	214 days	14%	Wed 8/30/23 5:00 PM	Wed 7/3/24 5:00 PM
1.8	Project Closeout	16 days	0%	Wed 7/3/24 5:00 PM	Thu 7/25/24 5:00 PM
1.9	Closeout Phase complete	0 days	0%	Thu 7/25/24 5:00 PM	Thu 7/25/24 5:00 PM
2	AWMS ... FINISH	0 days	0%	Thu 7/25/24 5:00 PM	Thu 7/25/24 5:00 PM

III. Resource Loaded Project Schedule

The resource-loaded project schedule is available as a [Microsoft Project file](#) at this Sharepoint location:

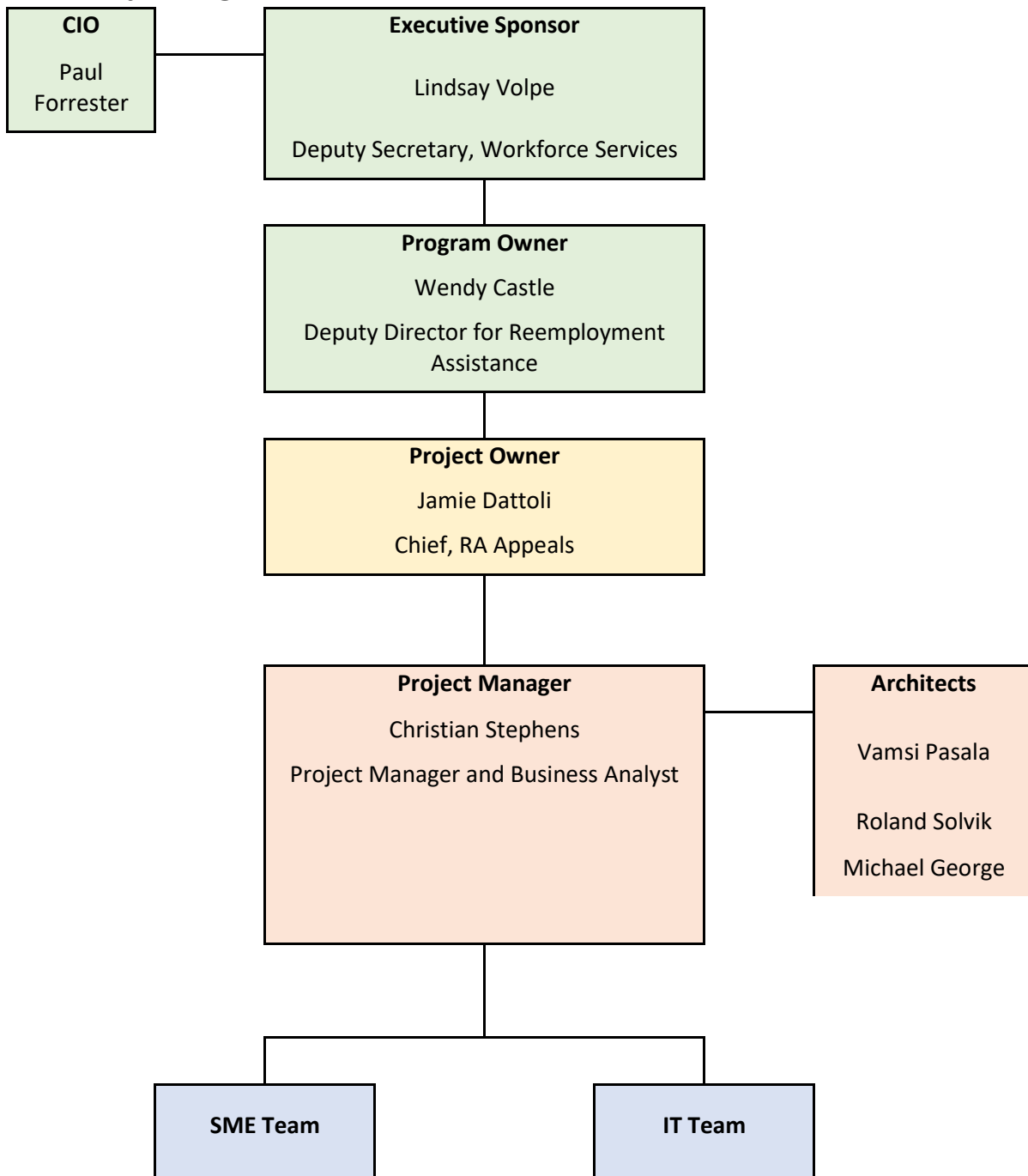
Central Repository > CM Projects > CM Projects > 21-Appeals Workflow Management System > Project Management > Rule 60GG Documents (Working) > Monitoring and Controlling > Project Schedule (Working)

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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 / Work Group	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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
		<ul style="list-style-type: none"> • Facilitate resolution of significant issues in the project. • Reviewing and signing off on key milestones.
Jamie Dattoli	Project Owner / Chief, RA Appeals	<ul style="list-style-type: none"> • 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.
Christian Stephens	Project Manager	<ul style="list-style-type: none"> • Manages all aspects of the project and ensures 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. • Manages vendor deliverables and schedule adherence.
SME Team	Subject Matter Expert(s)	<ul style="list-style-type: none"> • 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 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 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.

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- Vendors will respond to inquiries or requests from FloridaCommerce within one business day from receipt.
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FloridaCommerce believes successful project management hinges on the following:

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- 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 throughout engagement to increase adoption rate and ensure a successful transition	PM
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	Medium	Medium	Prioritize highest-risk access flows, adjust schedule, plan additional phases.	PM/SME

Risk Description/Impact	Probability of Occurrence (high, medium, low)	Risk Tolerance (high, medium, low)	Mitigation Strategy	Assigned Owner
are beyond original expectations.				

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 ECONOMIC OPPORTUNITY
DIVISION OF INFORMATION TECHNOLOGY
AND
DIVISION OF WORKFORCE SERVICES**

FISCAL YEAR 2023-2024

QUARTER 1

PREPARED ON 10-06-23

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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 are able to 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 3, 2023	RFQ Created
December 1, 2023	Vendor Response
December 15, 2023	Request for Information Process Completed
January 5, 2023	Procurement of Vendor Completed
January 12, 2024	Development to Begin

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
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.

Major Milestone	Deliverable Description
Project Closeout Report	The PM provides the Project Closeout Report

G. Key Stakeholders

Key Stakeholder	Project Interest
J. Alex Kelly	Secretary, Department of Commerce
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
Mark Miller	RA Modernization Acting Project Owner
Tom Richardson	RA Modernization Lead Program Manager – Strategic Planning Office
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
1.1	Initiation
1.1.1	Risk and Complexity Assessment
1.1.2	PM Deliverable: Project Charter

WBS	Task Name
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 RFI
1.5.2	Approve RFI
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
1.7.6	Manage Decisions
1.7.7	Manage Action Items
1.7.8	Manage Cybersecurity

WBS	Task Name
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 9/26/23
1.1.3	Project Charter complete	90%	1 days	Tue 9/26/23	Fri 10/20/23
1.1.4	Stakeholders Register	100%	1 day	Mon 8/22/23	Mon 8/22/23
1.1.5	Project Kickoff Meeting	100%	1day	Mon 8/15/23	Mon 8/15/23
1.1.6	Conduct Lessons Learned Meeting	0%	2 days	Mon 9/25/23	Tue 9/26/23
1.2	Initiation Phase complete	70%	0 days	Fri 9/29/23	Fri 10/20/23
1.3	Planning	0%	120 days	9/29/23	Mon 1/15/24
1.3.1	RFQ Conducted	0%	30 days	Fri 11/3/23	Fri 12/01/23
1.3.2	Resource Plan Complete	0%	5 days	Fri 11/3/23	Fri 11/10/23
1.3.3	PM Deliverable: Project Schedule	0%	15 days	Mon 12/11/23	Fri 1/5/24
1.3.4	Project Schedule complete	0%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.5	PM Deliverable: Project Management Plan	0%	59 days	Mon 1/8/24	Mon 1/8/24
1.3.6	Project Management Plan complete	0%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.7	PM Deliverable: Project Budget	0%	13 days	Mon 1/8/24	Mon 1/8/24
1.3.8	Project Budget complete	0%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.9	PM Deliverable: Project Spending Plan	0%	3 days	Mon 1/8/24	Mon 1/8/24

WBS	Task Name	% Complete	Duration	Start	Finish
1.3.10	MILESTONE: Project Spending Plan complete	0%	0 days	Mon 1/8/24	Mon 1/8/24
1.3.11	Complete Impact Analysis	0%	1 day	Mon 1/8/24	Mon 1/8/24
1.3.12	Requirements:	50%	116 days	Mon 9/18/23	Mon 1/8/24
1.3.13	Complete the Planning Gate R&C Assessment	50%	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	Fri 1/12/24
1.5	Execution	0	156 days	Mon 1/15/24	Fri 6/28/24

IV. Project Spending Plan

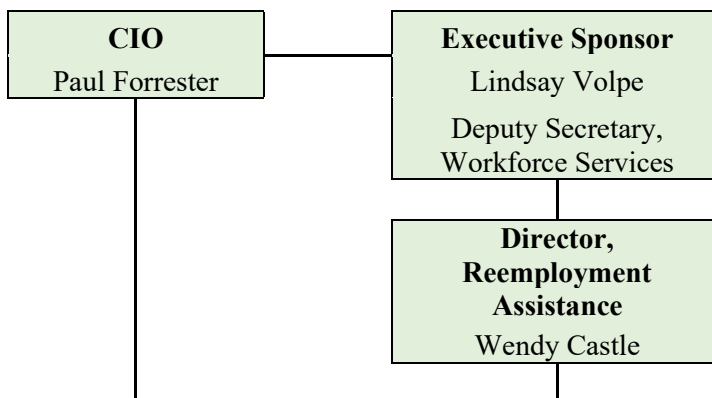
The Document Imaging System project has existing resources assigned, therefore, there is no current spend for this project. Expenditures are anticipated once a procurement is complete and a contract for products and/or services is executed.

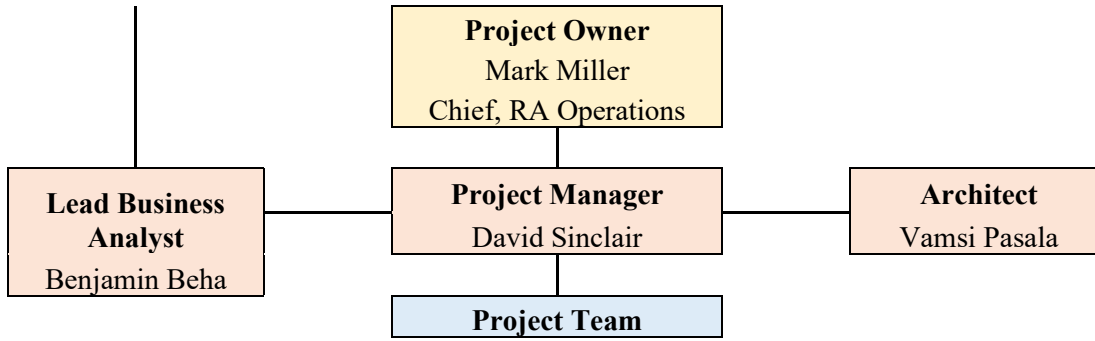
FY 2023-24 Expenditures	FY 2024-25 Expenditures
Software: \$0.00	Software: \$0.00
Other OpEx (Vendor Deliverables): \$0.00	Other OpEx (Vendor Deliverables): \$0.00
Other CapEx: \$0.00	Other CapEx: \$0.00

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	<ul style="list-style-type: none"> 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)	<ul style="list-style-type: none"> 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 of Reemployment Assistance	<ul style="list-style-type: none"> 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
Mark Miller	Project Owner/Chief of RA Operations	<ul style="list-style-type: none"> 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.

Name	Project Role	Responsibility
		<ul style="list-style-type: none"> • Tracks project benefit recognition, risk retention and mitigation activities • Acts as liaison between teams and Management for issue escalation and resolution
Linda Lawler	Project Manager	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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. • 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.				

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

VIII. Capacity Plan

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