

To: David Bennett, Project Manager
Department of Management Services

From: Audrey Harrell
Accenture

Submittal Date: October 30, 2002

Due Date: November 8, 2002

Subject: Transmittal of Deliverable #5

DELIVERABLE NUMBER/NAME: #5 Kickoff Meeting Presentation

We are pleased to submit the attached deliverable for your approval. We are providing these materials in soft copy, and can provide a hard copy upon your request. Included in this deliverable are the materials reviewed in the October 17, 2002 Kickoff Meeting.

Deliverable #5: Kickoff Meeting Presentation consists of the following:

- Project Schedule and Contract Milestones
- A list of requested State Resources
- Super User Group Criteria
- Agency Liaison Criteria
- The Project Organizational Chart
- Accenture Points of Contact

We respectfully request that all of the Department's issues or concerns be provided to the Accenture team in writing within 5 business days (by November 6, 2002). Issues or concerns should be addressed to Audrey Harrell at audrey.r.harrell@accenture.com.

Please indicate your approval and acceptance of this deliverable, on behalf of the Department, by signing and returning the attached Deliverable Approval sheet to Audrey Harrell within the 5 business day review period. If we do not receive any issues or concerns within the 5 business day review period, the deliverable will be considered to be "Approved" by the Department.

Should the Department wish to post this deliverable online, please indicate this request in an e-mail message to Audrey Harrell. Upon receipt of such e-mail, we will work with the Marketing and Communications team to proceed with such posting as soon as reasonably possible.

Deliverable Approval Sheet

Deliverable #5

By signing this Deliverable Approval Sheet, the Department acknowledges and agrees that it has carefully reviewed Deliverable # 5 and agrees that Deliverable # 5 satisfies all applicable specifications and other requirements of the Agreement. The Department hereby accepts Deliverable # 5 in fulfillment and completion of the Agreement with respect to Deliverable # 5 requirements.

Deliverable #5: Kickoff Meeting Presentation

David Bennett, Project Manager

Name

Date

Project Schedule and Contract Milestones

	month	1-2	3-5	6-8	9-11	12-14	15-17	18-20	21-23	24-26	27-29	30-32	33-25	36-38	39-50	51-61
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- Implementation and Deployment to any other Eligible Users

*eff. 10/9/2002

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State Resource Requests Outside PMO

#	Role	% Utilization by Phase		Requirements	Track								
		Mobilization 1 month	Development 6 months		Change Management / Communications	Application Development / Interface	Hosting / Technical Infrastructure	Strategic Sourcing	Supplier Adoption	Business Operations			
12	DMS - Office of Supplier Diversity Liaison (Wendell Paige)	0%	40%	MWBE System owner - data format and system integration requirements (Dwain Cargile)								X	
				MWBE Process design feedback - Audit process feedback							X		
				Provide information about State's MWBE program and current performance							X		
				Describe State's MWBE qualification process and provide list of current certified MWBE suppliers							X		
				Describe State's MWBE proposed audit process in place of certification process							X		
				Describe State's documentation requirements pertaining to MWBE							X		
13	DMS/STO - SPURS Functional and Technical Liaison	20% - 30%	1 FTE - 30% - 40% (50% - 75% during key testing weeks) 1 FTE (2 months) additional resource for new development	Assist in qualification of MWBE suppliers								X	
				Assist in identifying additional MWBE suppliers							X		
				Provide insight / clarification policies & procedures, processes (Day-to-day operational procedures, scheduling, maintenance procedures, reporting, exception processing (outages, restarts...))							X		
				Provide information on current roles & responsibilities							X		
				Identify and secure resources for participation on conversion/interface team as appropriate (SME's ...)							X		
				Provide insight on initiatives underway which may impact our schedule \ work							X		
14	DMS/STO - HR System (User Data) Functional and Technical Liaison	20% - 40%	1 FTE (2 months) additional resource for new development	Provide current volumetric information									
				Coordinate access to data									
				Extract and transmit requested data							X		
				Provide detailed field-by-field explanations for both business functional and technical usage							X		
				Assist/coordinate with the testing effort. (Unit Testing, System Testing, Acceptance Testing, Testing with other state agencies as applicable, supporting the testing effort in current environment)							X		
				Provide insight / clarification policies & procedures, processes (Day-to-day operational procedures, scheduling, maintenance procedures, reporting, exception processing (outages, restarts...))							X		
15	DMS/STO -Vendor Master /Vendor Registration	20% - 30%	1 FTE (2 months) additional resource for new development	Identify and secure resources for participation on conversion/interface team as appropriate (SME's ...)								X	
				Provide insight on initiatives underway which may impact our schedule \ work							X		
				Provide current volumetric information							X		
				Coordinate access to data							X		
				Extract and transmit requested data							X		
				Provide detailed field-by-field explanations for both business functional and technical usage							X		
16	DMS - Training / Change Management Liaison	20%	30% - 40%	Assist/coordinate with the testing effort. (Unit Testing, System Testing, Acceptance Testing, Testing with other state agencies as applicable, supporting the testing effort in current environment)								X	
				Provide information on training audiences							X		
				Provide information on training needs assessment (i.e. computer awareness / internet awareness)	X								
				Assist with training logistics and scheduling of users	X								
				Assistance in understanding current channels of communication for training	X								

State Resource Requests Outside PMO

#	Role	% Utilization by Phase		Requirements	Track					
		Mobilization 1 month	Development 6 months		Change Management / Communications	Application Development / Interface	Hosting / Technical Infrastructure	Strategic Sourcing	Supplier Adoption	Business Operations
Department of Banking & Finance (DBF)										
17	DBF/STO - FLAIR Functional and Technical Liaison	30% - 40%	1 FTE - 40% - 50% (1 - 2 FTE 50% - 75% during key testing weeks) 1- 2 FTE (2 months) - additional resource for new development	Provide insight / clarification policies & procedures, processes (Day-to-day operational procedures, scheduling, maintenance procedures, reporting, exception processing (outages, restarts ...))		X	X			X
				System detail - Vendor add/modify/delete functionality, usage, limitations		X		X		X
				Provide detailed field-by-field explanations for both business functional and technical usage.		X		X		X
				Identify and secure resources for participation on conversion/interface team as appropriate (SME's ...)		X		X		X
18	DBF/STO - P-Card Functional and Technical Liaison	20% - 30%	1 FTE (2 months) additional resource for new development	Provide insight on initiatives underway which may impact our schedule \ work		X	X			X
				Provide current volumetric information		X		X		X
				Coordinate access to data		X		X		X
				Extract and transmit requested data		X		X		X
19	DBF - Comptroller's Office Liaison	20%	5%	Provide detailed field-by-field explanations for both business functional and technical usage.		X	X			X
				Assist/coordinate with the testing effort. (Unit Testing, System Testing, Acceptance Testing, Testing with other state agencies as applicable, supporting the testing effort in current environment)		X		X		X
				Extract FY02 spend data from FLAIR		X		X		X
20	DBF - Central Accounting Liaison	0%	20% - 40%	Provide current Accounting org. structure, compensation ranges by level, current roles & responsibilities		X			X	
				Provide Accounting's current vision, performance metrics		X			X	
				Provide information on current State Accounting policies & procedures, processes		X			X	
				Provide information on invoice reconciliation processes		X				X
21	DBF - Agency Payables Liaison	0%	20%	Provide information on agency payables processes including cards		X				
22	DBF - State Auditor	0%	20%	Provide information on current audit controls and processes		X				
State Technology Office (STO)										
23	State Technology Office Liaison	0%	20% - 40%	Provide information on current IT / Telecom contracts and FY02 spend		X			X	
				Provide details around State's technology / communication infrastructure		X		X		
				Provide information on data privacy requirements		X		X		
				Provide information on historical data requirements		X		X		
				Provide information on current IT / Telecom purchasing processes and policies		X		X		
				Participate on IT / Telecom category sourcing teams as appropriate				X		

State Resource Requests Outside PMO

#	Role	% Utilization by Phase		Requirements	Change Management / Communications	Track					Business Operations
		Mobilization	Development			Application Development / Interface	Hosting / Technical Infrastructure	Strategic Sourcing	Supplier Adoption		
Eligible User Agencies											
24	Eligible User Agency Liaison (1 per Eligible User Agency)	10%	40% - 60%	Identify pilot agency contacts / resources (DOT/DMS)		X					X
				Identify agency contracts that are coming up for renewal in next 12 months		X		X		X	
				Facilitate collection of agency contract details (including term, pricing, T&Cs, etc.)		X		X			
				Provide information on agency purchasing organization, roles & responsibilities		X		X			
				Provide current Agency Purchasing & Accounting FTE counts				X			
				Provide insight on agency initiatives underway or planned to reduce procurement costs, rationalize suppliers				X			
				Provide names and contact information for key agency personnel	X						
				Facilitate categorization / validation of FY02 agency spend and estimation of future spend levels				X			
				Coordinate access to Agency category SMEs		X		X			
				Provide performance metrics for agency				X			
25	Agency Spend / Contract SMEs (number will depend on focus categories and impacted agencies)	0%	40% - 60%	Identify and secure resources for participation on sourcing teams as appropriate							
				Coordinate the agency review / approval of proposed suppliers, processes, policies, etc.						X	
				Provide information on agency-specific AS-IS purchasing/requisition process		X					
				Provide information on the agency-specific approval process (commodity-specific, non-catalog, other)		X					
				Describe the current agency receiving process		X					
				Provide information on the current agency procurement policies and procedures		X					
				Provide sourcing tools used currently (RFP, RFQ, RFI)		X					
				Provide information on current agency contract management process		X					
				See separate document for criteria for Agency Liaison		X					
				Provide deep category-specific knowledge about current suppliers, future usage, agency contract details, etc.			X				
26	Super User Group Buyers			Actively participate in category sourcing team as appropriate		X					
				Requirements for supplier communications such as notification of winner and intent to protest		X		X			
				Provide list of each type of contract		X					
27	Super User Group Vendors			Provide clarity/direction on sourcing templates utilized		X					
				See separate document for details around Super User Groups	X						
Vendors											
27	Super User Group Vendors			See separate document for details around Super User Groups	X						

Super User Group Definition

Section 3.1.6 of the Web-Based eProcurement System contract calls for the formation of a Super User Group. The text of the contract follows:

The Super User Group shall be appointed by the Secretary or designee and serve at the pleasure of the Secretary. It shall be comprised of representation from the various user constituencies, including both buyers and sellers. Buyers shall be represented by selected State employees from multiple agencies and having multiple roles within the eProcurement System. Sellers shall be represented by selected Vendors. There will be a special focus on MWBE participation among the Vendors selected. In addition, the Super User Group will include a member from the Office of Supplier Diversity for the purpose of supporting and facilitating the goals of the One Florida initiative.

The Super User Group shall be responsible for providing input and feedback to the eProcurement System management team about needs, problems, successes, and effective practices, long-term strategic objectives, and other requested input.

This document contains suggested composition and criteria for the formation of two Super User Groups: a Buyer Super User Group and a Supplier Super User Group.

Buyer Super User Group

The Buyer Super User Group should be composed of selected State employees from multiple agencies and having multiple roles in the eProcurement System – the users in this group will represent their peers from other agencies. This group will be responsible for providing input and feedback to the eProcurement System management about needs, problems, successes and effective practices and facilitating the goals of the One Florida initiative and of the Florida Web-Based eProcurement System. This group will participate in the Conference Room pilot that will be conducted in mid December to provide input and feedback on the eProcurement System.

The members of the Buyer Super User Group will be appointed by the Secretary or designee. We recommend participation of approximately 30-40 people from a variety of roles and agencies.

Suggested Qualifications

The project team recommends that the users selected to be members of the Buyer Super User Group have the following qualifications:

- Have the time to participate (see time requirements below)
- Knowledgeable of the current system(s) (SPURS or FLAIR as appropriate)
- Knowledgeable of procurement statutes and rules
- Not afraid to speak up
- Open minded
- Comfortable with technology
- Empowered to make decisions
- Connected (knows other people with similar roles in multiple agencies and can ask for their opinions)

Suggested Representation by Procurement Role

Additionally, we suggest that representation to this group have a variety of roles. The number of suggested users for each role is in parenthesis (n).

- Agency Purchasing Agents (10)
- DMS Contract specialists (3) (1 for IT commodities and 2 non-IT commodities)

- Requisitioners (10)
- Approvers (2)
- Receivers (2)
- Budget/Finance Officer (1)
- AP Mgr (2)
- AP Clerks (2)
- Office of Supplier Diversity (1)
- Pcard Office (1)
- PRIDE (1)

Additionally, we recommend representation in the Buyer User Group of members of up to 6 agencies beyond the first roll out of agencies (e.g. non-SPURS agencies).

- Purchasing Officers (6)

Suggested Representation of large agencies

Due to the size of the agencies and size of their procurement spend, we recommend that at a minimum, the following agencies have two representatives in the Buyer Super User Group.

- Department of Management Services
- Department of Transportation
- Department of Children and Family Services
- Department of Corrections
- Department of Juvenile Justice
- Department of Health
- Department of Environmental Protection
- Department of Revenue

Time Requirements of Buyer Super User Group

It is anticipated that the Buyer Super User Group will have the following time commitments:

- Requirements Confirmation Interviews (10/28 – 11/15) Available for interviews as needed
- Conference Room Pilot – Round 1 (12/9 – 12/20) – Full Time
- Conference Room Pilot – Round 2/Confirmation (1/27 – 1/31) – Full time
- User Acceptance Test (March 03)
- Ongoing: 4 hours once a month

Supplier Super User Group

The Supplier Super User Group should include representative vendors. This group will be responsible for providing input and feedback to the eProcurement System management about needs, problems, successes and effective practices and facilitating the goals of the Florida Web-Based eProcurement System from a supplier perspective. This group will participate in the a Supplier Forum to provide input and feedback on the eProcurement System.

Suggested Representation of suppliers

The members of the Supplier Super User Group will be appointed by the Secretary or designee. We recommend participation of approximately 20-25 vendors from a variety of vendor sizes, contracting mechanisms and MWBE vendor representation. Table 1 (Suggested composition for Supplier Super User Group) contains our suggestion.

Table 1. Suggested composition for Supplier Super User Group

Category **	Suggested Number of Vendors	Suggested Vendors (if any)	Comments
Term Contract Vendor	2	250-000-03-1 - IT Hardware	34 Vendors on Contract, would recommend choosing 1 or 2 Vendors
Term Contract Vendor	2	252-005-01-1 – Computer Software Attachmate Corporation P.O. Box 90026 Bellevue, WA 98009	
Term Contract Vendor	1	388-120-02-1—Cereals Kellogg Corporation 677 Larch Avenue Elmhurst, IL 60126	
Term Contract Vendor	1 or 2	420-590-02-1-- Library Furniture	28 Vendors on Contract, would recommend choosing 1 or 2
Term Contract Vendor	1	490-000-96-1-- Laboratory Supplies Fisher Scientific Company 3970 John's Creek Court Suwannee, GA 30024	
Term Contract Vendor	2 or 3	618-001-00-1-- Office Products and Desktop Consumables	Recommend choosing 2 or 3 vendors including MWBE if applicable
Term Contract Vendor	3	730-100-99-1 – Facsimile Machines (3) Sharp Electronics Corporation Ameritrend Corporation Panasonic Corporation	
Term Contract Vendor	1 or 2	765-900-02-1-- Tractors, Mowers and Cutters	11 Vendors on Contract, would recommend choosing 1 or 2
Corrections Enterprises	1	PRIDE (Correction Enterprises)	
Manufacturer/Dealer	2		Recommend adding 2 vendors from separate contracts
Open Market Vendors	5		Recommend adding 5 vendors from diverse commodities/services

Table 1

** In selecting above vendors, need to ensure that we are including both MWBE and influential vendors

Time Requirements of Supplier Super User Group

It is anticipated that the Supplier Super User Group will have the following time commitments:

- Initial Supplier Forum – 4 hours
- Ongoing: 4 hours every two months during first year

Agency Liaisons and Agency Primary Contact or “Champion” Definition

One of the critical success factors for Web-Based eProcurement System is to obtain agency involvement during the entire implementation process. The eProcurement project team will be assigning each agency with a Agency Liaison to serve as the primary point of contact between the project and the agency. By the same token, each agency needs to assign an Agency Primary Contact to facilitate the communication between the agency and the eProcurement project.

Agency Liaison

Within the first 45 days of the contract, the eProcurement project team will identify one person (liaison) from each Initial User Department that will function as the primary contact and facilitator for interaction between the eProcurement project and each Department. The Agency Liaison (or “Buyer Liaison”) will:

- Explain the eProcurement project to each agency
- Work directly with the agency champions on change management and configuration activities
- Assist in the scheduling and delivery of training
- Provide “hands on” support to the agency during deployment

Agency Primary Contact or Agency Champion

Each Agency needs to assign an individual to become the primary agency contact with the eProcurement Project team. Depending on size and complexity, the agency may choose to assign more than one agency champion. However, one of the agency champions needs to be designated the Primary Agency Contact.

The Agency Primary Contact will be responsible for being the primary point of contact between the agency and the eProcurement project. The Agency Primary contact will identify current business processes and assist in identify how the eProcurement system will affect their agency, identify issues, provide input and feedback to the eProcurement System project management about needs, problems, successes and effective practices. Among the tasks the agency contact will participate in are:

- Participate in weekly or bi-weekly agency meetings with their User Liaison
- Attend Conference Room Pilot (optional but highly recommended)
- Determine appropriate requisition approval flows, user roles
- Provide lists of system users, ship-to locations, bill-to locations
- Facilitate identifying and scheduling of users to be trained
- Identify issues of how the eProcurement System may impact their agency
- Develop/modify agency policies and procedures that may be impacted by eProcurement System

Suggested Qualifications

The eProcurement project team recommends that the users selected to be agency contacts have the following qualifications:

- Have the time to participate (see time requirements below)
- Knowledgeable on the current system(s) (SPURS or FLAIR as appropriate)
- Knowledgeable of procurement statutes and rules
- Knowledgeable of the agency's procurement processes, policies and procedures
- Not afraid to speak up
- Open minded
- Comfortable with technology
- Empowered to make decisions
- Connected (can contact others within the agency to get answers, facilitate implementation, etc.)

Time Requirements of Primary Agency Contact

It is anticipated that the Primary Agency Contact role will require approximately 2 days a week.

Steering Committee

John O. Agwunobi (DOH), Kim Bahrami (STO), Thomas Barry (DOT), Tom Gallagher (DOI), Renee Gunn (Gov. Office), Cynthia Henderson (DMS), Jim Horne (DOE), Michael Moore (DOC), Kathleen Shanahan (Gov. Ofc), Barry Webster (Accenture), David Wilkins (Accenture), Jack Wilson (Accenture)

Program Management Office

Program Director - Ed Rodriguez (DMS)
Project Manager - David Bennett (DMS)
Program Director - Audrey Harrell (Accenture)
Solutions Architect - Jeff Zaniker (Accenture)

Quality Management

Lead - David Moskovitz (Accenture)
Steve Shane (Accenture)
Donavon Favre (Accenture)

Change Management/ Communications

Kathleen Anders (DMS)
Kim Koegel (Accenture)

Application Development and Pilot

Will Caseber (Accenture)

Strategic Sourcing

Judy Stimson (Accenture)
Jim Bard (Accenture)

Vendor Adoption

George Johnson (Accenture)

Business Operations

Don Miller (Accenture)

Technical Infrastructure/ Hosting

Ed Gendusa (Accenture)

Florida Dept. of Management Services
Based eProcurement System

Accenture Contact Information

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