

LONG-RANGE PROGRAM PLAN
Fiscal Years 2004-2005 through 2008-2009

September 15, 2003

DEPARTMENT OF MANAGEMENT SERVICES

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September 15, 2003

Ms. Donna Arduin, Director
Office of Policy and Budget
Executive Office of the Governor
1701 The Capitol
Tallahassee, Florida 32399-0001

Mr. Mike Hansen, Staff Director
House Appropriations Committee
221 The Capitol
Tallahassee, Florida 32399-1300

Mr. David Coburn, Staff Director
Senate Appropriations Committee
201 The Capitol
Tallahassee, Florida 32399-1100

Dear Directors:

Enclosed is the Long-Range Program Plan for Fiscal Years 2004-2005 through 2008-2009 for the Department of Management Services.

If you have any questions or need additional information, please contact Debra Forbess, Budget Director, at 488-0968.

Sincerely,

William S. Simon
Secretary

WSS: eg

Department Of Management Services

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INTRODUCTION

MISSION: TO BE A CUSTOMER FOCUSED AGENCY, PROVIDING EFFICIENT AND EFFECTIVE SERVICES IN ORDER TO BETTER ENABLE STATE AGENCIES AND EMPLOYEES TO DELIVER THE GOVERNOR'S PRIORITIES TO THE PEOPLE OF FLORIDA

As a part of the Governor's team of agencies, the Department of Management Services is committed to providing the best customer service, while developing and implementing key initiatives which focus on increasing citizen access to government, delivering cost effective products and services, promoting and supporting economic development in Florida and improving government productivity in partnership with other government entities and the private sector.

The Department as a whole strives to provide the best customer service and effective business solutions through technology, teamwork, and partnerships. We are particularly focused on opportunities that enhance the relationship between governmental agencies and with Florida's citizens through the use of technology. Several of the key initiatives are MyFloridaMarketPlace, People First, and the modernization of the human resource infrastructure.

By committing to develop an electronic purchasing system, Florida is charting a path toward making government operate more efficiently while providing better services to meet the changing needs of the state and its businesses. By aggregating the spending for goods and services, the State of Florida will be better positioned to negotiate contracts based on economies of scale. As a result, all agencies will benefit from increased competition among the state's vendors, as we create an industry-leading system.

MyFloridaMarketPlace will allow State buyers to electronically request and receive price quotes from vendors, reducing time, eliminating paperwork, and streamlining the overall procurement process. Additionally, the new system will enhance the vendor registration process as well as provide vendors easier access to up-to-date purchasing information.

People First, the State's human resource initiative, will streamline the transactional processes involved in the collection of attendance and leave, payroll preparation, applicant management, and personnel operations. This will allow personnel offices to dedicate more time to value-added activities such as strategic planning, program management, employee relations, workforce utilization, policy implementation, and compliance. It will also provide state managers and policy makers access to state-of-the art technology designed for the purpose of providing and reporting information from which sound policies can be implemented. Employees will benefit from access to services that are not available today.

As a service driven organization, the Department of Management Services is committed to providing our customers the most effective services as efficiently as possible. To accomplish this objective, the Department will focus mainly on the efficient use of technology and strategic public sector and private sector partnerships. The more tax dollars saved in the administration of government, the more funding that can be allocated to the Governor's priorities, such as education, elder services and helping our most vulnerable. Therefore, the employees of the Department are committed to making these strategies successful and, through successful implementation of these strategies, freeing up resources throughout state government to be most effectively utilized in serving the needs of the people of Florida.

DEPARTMENT OF MANAGEMENT SERVICES

AGENCY GOALS, OBJECTIVES AND SERVICE OUTCOMES WITH PERFORMANCE PROJECTION TABLES

Workforce Program

GOAL #1: To ensure the value of quality services delivered to Florida's citizens, the Workforce Program administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.

OBJECTIVE 1A: To recruit, retain, reward and recognize a high performance workforce for the State of Florida.

OUTCOME: Overall customer satisfaction rating.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Human Resource Management	85% (2000/2001)	96%	96%	96%	96%	96%

OBJECTIVE 1B: To provide comprehensive and cost-efficient insurance benefits for the employees of the State of Florida utilizing technology.

OUTCOME: DMS Administrative cost per insurance enrollee.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
State Group Insurance	\$13.90 (2001-2002)	\$10.27	\$10.27	\$10.27	\$10.27	\$10.27

OBJECTIVE 1C: To administer economical and efficient state retirement programs utilizing best technology.

OUTCOME: Percent of retired payrolls processed timely.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Retirement	100% (2000-2001)	100%	100%	100%	100%	100%

Support Program

GOAL #2: To promote diversity in state contracting opportunities while getting best value in purchasing.

OBJECTIVE 2A: Increase minority business state contracting opportunities.

OUTCOME: Average minority certification process time (in days).

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Office of Supplier Diversity	45 (1998/99)	15	15	15	15	15

Support Program continued

GOAL #3: To provide best value purchasing and fleet management services.

OBJECTIVE 3A: To use the combined purchasing power of the State of Florida to deliver the best total value in goods and services purchased by the State and eligible users.

OUTCOME: Percent state term contract savings.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Purchasing Oversight	23% (1996/97)	28%	28%	28%	28%	28%

OBJECTIVE 3B: To provide the maximum amount of Federal excess/surplus property to eligible recipients without burdening state resources.

OUTCOME: Federal Property Distribution Rate.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Federal Property Assistance	86% (1999/00)	95%	95%	95%	95%	95%

OBJECTIVE 3C: To provide cost-effective and efficient fleet management of motor vehicles and watercraft.

OUTCOME: State contract daily vehicle rental rate vs. Private Provider daily vehicle rental rate.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Fleet Management	\$28.99/\$53.73 (2000-2001)	\$32.00/\$82.00	\$33.60/\$86.10	\$35.28/\$90.41	\$37.04/\$94.93	\$38.89/\$99.68

OBJECTIVE 3D: To provide safe and efficient fleet management of aircraft and the Executive Aircraft Pool.

OUTCOME: Cost per flight hour-State vs. Private Provider.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Aircraft Management	\$1,836/\$1,822 (2000-2001)	\$1,750/\$1,800	\$1,803/\$1,854	\$1,857/\$1,910	\$1,912/\$1,967	\$1,970/\$2,026

Facilities Program

GOAL #4: To provide a cost-effective, efficient and safe work environment.

OBJECTIVE 4A: To maintain a competitive rental rate.

OUTCOME: Average Department of Management Services full service rent - composite cost per net square foot (actual) compared to Average Private Sector full service rent - composite cost per net square foot in markets where the Department manages office facilities.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Facilities Management	\$15.39/\$16.51 (2000-2001)	\$14.69/\$17.89	\$14.98/\$18.25	\$15.28/\$18.61	\$15.59/\$18.98	\$15.90/\$19.36

Facilities Program continued

OBJECTIVE 4B: To maintain a competitive construction rate.

OUTCOME: Gross square foot construction cost of office facilities for the Department of Management Services compared to gross square foot construction cost of office facilities for private industry average.

	Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
Building Construction	\$80.52 / 84.75 (1995/96)	\$87.59/\$94.19	\$90.65/\$97.49	\$93.83/\$100.90	\$97.11/\$104.43	\$100.51/\$108.08

State Technology Office

GOAL #1: Provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.

OBJECTIVE 1A: Leverage technology to gain efficiencies across the enterprise, simplify citizen's electronic access and improve customer service.

OUTCOME: Percent of customers satisfied.

Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
86.90% (2001-2002)	80%	80%	80%	85%	85%

Commission on Human Relations

GOAL #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.

OBJECTIVE 1A: Encourage fair treatment, equal access, and mutual respect.

OUTCOME: Percent of civil rights cases resolved within 180 days of filing.

Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
60% 2001-2002	70%	70%	70%	70%	70%

Correctional Privatization Commission

GOAL #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

OBJECTIVE 1A: Contract for cost effective private prisons.

OUTCOME: Per diem cost of private prisons.

Correctional Privatization Commission continued

Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
\$49.56 (1999/00)	\$54.40	\$56.03	\$57.71	\$59.44	\$61.22

Public Employees Relations Commission

GOAL #1: To protect public labor and employment rights, and protect the public by preventing work stoppages.

OBJECTIVE 1A: Resolve disputes about the composition of bargaining units and alleged unfair labor practices; and, administer the Career Service System appeals process with regard to discipline, veteran's preference, drug-free workplace, age discrimination and whistle-blower's act.

OUTCOME: Percent of timely labor and employment dispositions.

Baseline/ Year	FY 2004-05	FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09
89% 2001-2002	94%	94%	94%	94%	94%

DEPARTMENT OF MANAGEMENT SERVICES

IDENTIFICATION OF AGENCY GOALS TO THE THREE GOVERNOR'S PRIORITIES

As a part of the Governor's team of agencies, the Department of Management Services is committed to providing the best customer service, while developing and implementing key initiatives which focus on increasing citizen access to government, delivering cost effective products and services, promoting and supporting economic development in Florida and improving government productivity in partnership with other government entities and the private sector.

#1 – Improving Education

- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.

#2 – Strengthening Families

- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

#3 – Promoting Economic Diversity

- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

LINKAGE OF AGENCY GOALS TO THE SIX GOVERNOR'S PRIORITIES

#1 – Improve Student Achievement

- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.

#2 – Reduce Violent Crime And Illegal Drug Use

- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

#3 – Create A Smaller, More Effective, More Efficient Government That Fully Harnesses The Power Of Technology To Achieve These Goals

- Department of Management Services Goal #1: To ensure the value of quality services delivered to Florida's citizens, the Workforce Program administers employment, insurance benefits, and retirement programs to enhance the productivity, effectiveness, and efficiency of the state's workforce.
- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.
- Public Employees Relations Commission Goal #1: To protect public labor and employment rights, and protect the public by preventing work stoppages.

#4 – Create A Business Climate That Is Conducive To Economic Opportunity

- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.

- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

#5 – Help The Most Vulnerable Among Us

- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

#6 – Enhance Florida’s Environment And Quality Of Life

- Department of Management Services Goal #2: To promote diversity in state contracting opportunities while getting best value in purchasing.
- Department of Management Services Goal #3: To provide best value purchasing and fleet management services.
- Department of Management Services Goal #4: To provide a cost-effective, efficient and safe work environment.
- State Technology Office Goal #1: To provide support and guidance to enhance the use and management of State information technology resources creating an integrated, digital government that leverages technology to gain efficiencies across the enterprise.
- Commission on Human Relations Goal #1: To insure fair treatment of both complainants and respondents in instances of alleged discrimination and to promote mutual respect and greater harmony among diverse groups.
- Correctional Privatization Commission Goal #1: To provide cost-effective, safe and secure prisons, and reduce recidivism.

Facilities Program

Trends and Conditions Statement

FACILITIES MANAGEMENT AND BUILDING CONSTRUCTION

In accordance with Chapters 216, 255, 287, and 272 Florida Statutes, the Facilities Program mission is to operate customer focused world-class facilities to better enable state agencies and employees to deliver the Governor's priorities to the people of Florida. The Facilities Program continues to flatten the organization by combining common tasks within both the Facilities Management and Building Construction service areas. This is accomplished through the expansion of the Fixed Capital Outlay Management System (FCOMS), which now includes private sector and Florida Facilities Pool leasing as well as the ability to track warranty and preventive maintenance in state-owned buildings. Additional efficiencies are achieved through the centralized handling of administrative and core service responsibilities such as executive planning, Fixed Capital Outlay (FCO) appropriations management, project management, facilities maintenance, statewide facilities inventory, and the oversight of buildings managed by the Department.

Within the Florida Facilities Pool, FCOMS is standardizing the uniform identification process for funding and prioritizing identified Deficiency Correction Projects. This will ensure the intended application of appropriated funds, which extends the lifecycle of state-owned buildings and reduces the costs of delivering the program's core services. This FCOMS management tool is an Oracle database that utilizes the convenience and efficiency of web technology to access appropriations, budget, project and operational related information. The FCOMS team received the Distinguished Work Unit Award from the 2003 Davis Productivity Awards (sponsored by Florida TaxWatch and the Florida Council of 100).

FACILITIES MANAGEMENT

Facilities Management provides building management services for 7.9 million gross square feet in the Florida Facilities Pool. This includes diverse services, such as FCO planning and appropriations management, facilities operations and maintenance, lease management and parking administration. The delivery of these services is mandated in Chapters 255 and 272, Florida Statutes and supported by rents paid into the Supervision Trust Fund and financed through the Bonded Building Program. Facilities Management strives to be a prudent custodian of the taxpayers' dollars through the efficient management of the public's real estate holdings, application of advancing technologies and continued innovation in the delivery of core services.

These services are provided to assist state agencies in carrying out their missions by alleviating tasks not related to their core activities. Facilities Management supports the Department's mission of becoming a customer-focused agency that provides effective and efficient services in order to better enable state agencies and employees to deliver the Governor's priorities to the people of Florida. The various services provided by Facilities Management are highlighted below.

Fixed Capital Outlay Planning and Appropriations Management

The FCO planning process for state facilities is conducted on an annual basis for renovation and repair of the Florida Facilities Pool. Interaction with state agencies allows DMS to be customer

focused and address long range plans to meet the diverse and changing facilities needs of state government. FCO Planning prepares the Capital Improvement Programs. The Capital Improvement Program provides the Legislative Budget Request (LBR) and plans for renovations to existing buildings to prevent deterioration of facilities in the Bonded Building Program. In addition, this planning activity addresses corrections of deficiencies that exist due to wear and damage, regulatory changes, advancements in technology and upgraded service standards. Examples include life safety, ADA compliance, environmental, tenant space refurbishment and building repairs (statewide Capital Depreciation Projects). Priorities are determined by the critical nature of the project, impact of the life cycle of the building and tenant needs (e.g., repairs are funded from the rental rate). This funding is critical to fulfilling the pledge to bond investors to maintain the Florida Facilities Pool buildings over the life of the bonds and protect the value of the real estate assets of the State of Florida.

FCO Appropriations Management is an essential responsibility of the Executive Branch, pursuant to s. 216.192(1), F.S. This includes implementing appropriations, managing encumbered funds, assuring contract compliance, certifying the budget releases and project budget management. FCO Appropriations Management assures that no FCO projects exceed the total appropriation available to the state agency. Fixed Capital Outlay appropriations management requires knowledgeable and professional level staffing in specific skilled areas to assure the process of implementing the intent of the Legislature. FCO Appropriations Management prepares fund release documentation, tracks and reports FCO appropriations, budget, project schedules, status reports and workload analyses. Without this, taxpayers and the Legislature would not be assured that the appropriated funds are expended in accordance with state law.

The current method of collection and disbursements of the rental revenue insures the integrity of the Florida Facilities Pool created under s. 255.506, F.S., by providing funds sufficient to meet debt service obligations and the operation and maintenance requirements of its inventory of facilities. Compliance with certain Federal guidelines relative to tenant agencies that receive Federal funding is necessary and funded through the Supervision Trust Fund.

Facilities Operations and Maintenance

Facilities Management is responsible for the operation and maintenance of 22 regional facilities and 44 facilities in Tallahassee that comprise the 7.9 million gross square feet in the Florida Facilities Pool. Management is continuously reviewing the way we provide customer-focused services in an effort to maintain world-class facilities to better enable state agencies and employees to deliver the Governor's priorities to the people of Florida. The strategic use of outsourcing and optimizing personnel to lower the cost of operating and maintaining the buildings is critical in meeting service goals and objectives.

Since 1994 the program continues to explore different alternatives for prioritizing Operations and Maintenance services. Currently, various Operations and Maintenance services have been outsourced in 73% of the facilities pool, which totals 5.7 million gross square feet.

Real Property Management

Facilities Management coordinates 10.2 million square feet of space leased from private industry and other governmental entities and 6.0 million net square feet of leaseable space in the Florida Facilities Pool. Over the next two years we will be striving to maximize occupancy of existing state-owned facilities by reducing the amount of private sector square footage leased. This

initiative resulted in fiscal year 2001/02 cost avoidance of \$8,572,199 by reducing the costs associated with 475,849 square feet of leased space.

The Florida Facilities Pool rental rate is a composite of facilities cost charged back to the customer in a cost-recovery system. When comparing the pool rate and private sector rates, the fiscal year 02/03 full service pool rate was \$15.39/net square feet versus an average full service private sector rate of \$17.20⁽¹⁾/net square feet paid by State agencies in markets where DMS has office facilities as of June 30, 2003. Based on fiscal year 02/03 rates the program estimates that the DMS full service rate will remain at a level at least 5% below the average private sector rate in markets where DMS has office facilities. As of July 1, 2003 the DMS full service rate was reduced to \$14.69 for Fiscal Year 03/04. Based on this current rate DMS estimates a much higher percentage difference below the average private sector rate in markets where DMS has office facilities.

Real Property Management allocates 24,088 parking spaces statewide. Centralized administration ensures that parking facilities owned by the state are utilized to the maximum extent possible, and are equitably provided to members of the state workforce. Customer service has improved by providing parking forms and other related functions on-line. Additional efficiency has been achieved by extending loading zone permits from one to three years, which has reduced administrative costs.

As a management tool, FCOMS is serving to clearly define the core activities and tasks of the Facilities Program. It has greatly improved the activities and tasks required to maintain the facility assets managed by the Department. We continue to implement additional enhancements to FCOMS by incorporating other activity processes, which are not fully automated.

Facilities Management provides for the efficient consolidation of activities that would normally be required by each of the various state agencies. Facilities Management will continue to provide the benefits of reduced rental rates for state agencies and the associated benefits of being a long-range owner through the Florida Facilities Pool. The outcomes of these activities are the providing of operations and maintenance services at a cost less than the private sector; and the providing of office space, for state agencies, at a cost less than the average private sector cost per square foot. This is accomplished through continuously monitoring performance and outsourcing where it is more economical to do so.

Real Estate Study

During the 2002/2003 fiscal year, the Department issued an Invitation to Negotiate to solicit responses from providers for the development of a Real Estate Analysis for the State of Florida. This study is being conducted by CLW Real Estate Services Group. This study is near completion and will provide a comprehensive evaluation of all Department managed facilities. This includes an analysis of the Department's real estate inventory and the provision of a complete and comprehensive recommendation of what action is most appropriate for each asset. This study will provide the Department with a foundation on which to base decisions related to the most efficient use of assets and the prioritization of funding for the Florida Facilities Pool.

Building Security

The 2002 Legislature changed the scope of responsibilities for Capitol Police in regards to the law enforcement jurisdiction. The formal transfer of Capitol Police from the Department of Management Services to the Department of Law Enforcement (FDLE) occurred on April 11,

2002. Tasks retained by the Facilities Program include the responsibility for contracting with private companies to provide security at most of the state-owned buildings in the Florida Facilities Pool. This is being accomplished through a security provider contract, interagency agreements and tenant agency security contracts. To provide for patrol and emergency response, arrangements have been made with local law enforcement in each area where state-owned facilities are maintained.

As a result of the attacks of 2001, the 2002 Legislature also passed an exception to the public records law related to public building plans that depict the interior or structural elements of a facility. The Division has implemented this new law by limiting access to building documents and requiring certain guidelines be followed. An inventory and centralization process of the approximately 40,000 printed and electronic documents is ongoing.

Facilities Management Summary

Facilities Management continuously evaluates the services it provides along with the related costs. Through these evaluations, the program has recognized the need to change the way we do business. This has occurred through the increased use of automation, better training for field personnel and the outsourcing of facilities maintenance services, where cost effective. It is expected that the Facilities Program will continue to advance these trends in a continuous effort to provide quality services at a minimum cost.

The major cost factors associated with the provision of the Facilities Management service are utilities, expenses and salaries. \$12.6 million is funded to pay for the utilities associated with the operations and maintenance of the 7.9 million gross square feet within the Florida Facilities Pool. \$11.8 million is funded for expenses, which is primarily used to pay for contractual obligations related to the operations and maintenance of the Florida Facilities Pool. These obligations include contracts for operation and maintenance services, custodial services, elevator maintenance, chiller maintenance, etc. \$12.6 million is funded for the salaries associated with 340.0 FTE that provide building oversight and maintenance services.

BUILDING CONSTRUCTION

To deliver world-class facilities, Building Construction serves as the Owner-Representative on behalf of the State in FCO Project Management oversight. Building Construction acts solely in the public interest to ensure that the value received is equal to the funds expended and that the State's safety and construction standards are maintained as mandated by Chapters 216.044, 255.29, 255.31 and 287.055, F.S. Building Construction provides a resource for the delivery process of public construction projects. In a process that often involves substantial tax dollars, project oversight ensures the public's interest is equitable and executed as intended by the Legislature.

Building Construction provides project oversight services for the construction, renovation, repair, modification, or demolition of buildings, utilities, parks, parking lots, or other facilities or improvements. Unlike other states that have an internal design and construction management activity, the Department contracts with private sector providers for all architect, engineer and construction manager services. This is accomplished through a competitive selection process mandated by Chapter 287.055(7), F.S. to assure the best-qualified provider is selected for the specific needs of each individual project. For project funds that are appropriated to the Department of Management Services, Building Construction serves as the Owner-Representative

on behalf of the State as mandated by Chapter 255.31(1), F.S. Some construction project funds are appropriated directly to State agencies that can enter into a fee for services contract with the Department to manage the delivery of their projects as mandated by Chapter 255.31(2), F.S. Building Construction serves as a resource to state agencies by alleviating tasks that are not a part of other State agencies core activities and by providing cost effective delivery of various types of facilities, which address needs specific to the State. Chapter 216.044, F.S. requires the Department to evaluate state agency and judicial branch FCO requests and make recommendations on construction requirements and costs.

FCO Project Management is a residual core responsibility of the Executive Branch as it provides oversight of funds appropriated and implements the law as intended by the Legislature. Currently, all design and construction funds managed by the Department are outsourced, in that the State retains its residual responsibility but contracts with private industry for the delivery of construction projects. The retained organization is composed of the functions the state must continue to perform, which are policy and managerial in nature. If the Department did not perform these services, it would be required by each agency that would not have the expertise required to assure the public's interest. Building Construction is also required to review all State agencies' Fixed Capital Outlay Capital Improvement Plans. Building Construction historically has managed FCO projects for agencies, such as the Executive Office of the Governor, Department of Agriculture and Consumer Services, Department of State, Department of Environmental Protection, Florida Wildlife Conservation Commission, Department of Law Enforcement, Spaceport Florida Authority, South Florida Water Management District, Veterans' Affairs, Highway Safety and Motor Vehicles, Military Affairs as well as the Legislative and Judicial Branch of the State government.

FCO Project Management oversight requires professional level staffing in specific skilled areas to assure the process of implementing the intent of the Legislature. Licensed and professional experts to perform the required tasks are the costs factor of this service. Without this, taxpayers and the Legislature would not be assured that the appropriated funds are expended in accordance with State law. This oversight assures that the value received is equal to the funds expended and that the State's safety and construction standards are maintained for the public's interest.

⁽¹⁾ Source: Fixed Capital Outlay Management System leasing data as of June 30, 2003

Support Program

Trends and Conditions Statement

PURCHASING OVERSIGHT

The mission of State Purchasing is to gladly deliver useful and innovative purchasing services in order to become a customer focused agency providing effective and efficient customer services.

Mandated by Chapters 112 part III, 119.07, 120.57, 283, 287, 413.031, 413.036, 413.037, 812.081, and 946.515, Florida Statutes, State Purchasing uses the combined purchasing power of the State of Florida to deliver the best value in goods and services for the State and eligible users. Our goal is to develop and implement sound procurement practices in accordance with executive policy and legislative mandates. State Purchasing is dedicated to build strong relationships with our key constituents – other agencies, local government, and vendors. State Purchasing provides professional leadership and guidance in understanding and using the best resources available.

State Purchasing promotes fair and open competition in the State's procurement process. All sources of supply are canvassed, acquisitions planned and scheduled, and contracts for the purchase, lease or acquisition of commodities and services are implemented. Additionally, State Purchasing promotes efficiency, economy and conservation of energy through the natural gas, fuel oil and other environmentally sensitive contracting efforts.

After several years of research and contract negotiations with leading private sector service-providers, in October 2002 the Department contracted with Accenture LLP to build, implement, and maintain a new statewide electronic procurement system, known as MyFloridaMarketPlace. State Purchasing is poised to lead the State into electronic procurement, which is widely accepted as the business-purchasing model for the future. Beginning in July 2003, MyFloridaMarketPlace will roll-out to all Governor's agencies. The system will also be made available to other eligible users including executive agencies, political sub-divisions, and public schools.

MyFloridaMarketPlace will help the State better direct, coordinate, evaluate, and resource its procurement process. By aggregating spending on products and services, the State will be better positioned to negotiate contracts with suppliers based on economies of scale. As a result, buyers will benefit from increased competition among the State's vendors, and vendors will benefit by reaching a greater purchasing audience. In addition to generating savings via the reduced cost of goods and services, MyFloridaMarketPlace will generate process efficiencies from reduced paperwork, overhead, and processing costs. For example the system provides:

- state of the art tools: Electronic, Internet-based transactions provide a consistent and more efficient way of doing business with the State - less paperwork and manual steps.
- increased access to buying entities: Registering with MyFloridaMarketPlace will provide vendors with access to all buyers using the system.
- enhanced economic development opportunities for small business: MyFloridaMarketPlace will enhance economic development opportunities for small business by increasing access to the "State" marketplace.

In order to assist the Governor in the achievement of building economic opportunity for all, we will continue to provide training, outreach and registration for vendors to broaden contracting opportunities to a more diverse vendor population. State Purchasing will continue to coordinate vendor workshop participation at the annual Florida Government E-XPO with other state agencies, universities, cities and counties to educate vendors about how to participate in purchasing opportunities.

Many factors affect our ability to meet performance standards for our outcome measure; estimated percent saved through use of state term contracts (e.g., market conditions, competition, state agencies' usage of state term contracts). However, over the next five years, we anticipate that State Purchasing's migration to online pricing efforts will provide significant cost savings of up to \$166 million to the state through use of state negotiated contracts/agreements.

OFFICE OF SUPPLIER DIVERSITY

The mission of the Office of Supplier Diversity is to robustly expand economic opportunities for Minority/Women Business Enterprises (MWBE's) by focusing on Customer Service to better enable state agencies and employees to deliver more efficient and effective service to the people of Florida.

In accordance with Chapter 255, s.255.102, Contractors Utilization of Minority Business Enterprises; Chapter 288, Part IV, s.288.703, Definitions; s.288.7031, Application of Definitions; s.288.706, Minority Business Loan Mobilization Program; and primarily Chapter 287, , with specific reference to s.287.0943, Certification of Minority Business, s.287.0931, Statewide and Interlocal Agreements...; s.287.094, Minority Business Enterprise Programs...; s.287.09451, Powers and Duties ... it is in the interest of the public welfare to meaningfully assist minority business enterprises that are vital to the overall economy of this state. The Office of Supplier Diversity provides leadership and guidance on certification and the registration of minority vendors and as well as in providing assistance in the utilization of M/WBE's that provide goods and services to state agencies and universities.

The office is responsible for measuring the amount of spending by state agencies with certified minority businesses and conducting compliance audits of certified minority businesses. It provides outreach to state agencies, organizations and vendors in all matters relating to state contracting opportunities. The office is charged with the responsibility of implementing the Minority Business Loan Mobilization Program and the Governor's Mentor Protégé Program. It serves as a liaison between state agencies and minority vendors by reviewing state agency 90 day spending plans and informing vendors about contracting opportunities. Also the office reviews contract documents to ensure that the language is not prohibitive to minority participation and to ensure that minority vendors will have a fair opportunity to compete.

The number of certified minority businesses has continued to increase over the years with the establishment of reciprocal agreements and one way certification with local governmental entities. These agreements allow the State of Florida to recognize vendors as certified minority businesses if they have been certified with local governments that meet the basic eligibility criteria. There is a need, however, to restructure and re-institute many of these agreements, especially in light of the recent change to an electronic registration and certification system, MyFloridaMarketPlace. It is anticipated that the number of certified minority businesses will continue to increase as more minority business enterprises avail themselves of the automated certification procedures within MyFloridaMarketPlace. On-line certification is intended to reduce administrative functions and provide vendors with the capability of managing their own

information regarding commodities and services offered to the state. The Office of Supplier Diversity anticipates that this process will reduce the current twenty day application processing time to ten days by fiscal year 2005-06.

The Office of Supplier Diversity is focusing on three key initiatives over the next 3 to 5 years. The first key initiative is to increase the reservoir of certified minority businesses available to provide goods and services to the State of Florida. This will be accomplished through streamlining the certification process and allowing minority vendors to be certified on-line via the internet through the portal of MyFloridaMarketPlace. In addition, the Office of Supplier Diversity will expand the existing database tracking system through MyFloridaMarketPlace to ensure that state spending with minority vendors is more accurately identified. This expansion will involve linking the existing database to the State's purchasing subsystem, (SPURS) and the Profiler database, which is currently used by the Office of Supplier Diversity, and it will create new synergy between the two listings.

The second key initiative is to create a system for state agencies to contract with minority vendors using a race and gender neutral program, which is the primary intent and focus of the Governor's One Florida Initiative. This will involve promoting equity in contracting by conducting outreach activities and improvements to tracking and monitoring of contracts, as well as by reporting more accurately certified minority business impacts in agency purchasing activities. Outreach activities will include matchmaking, trade fairs, regional training workshops, and seminars. Training is provided for the public and private sector and will include diversity training, electronic procurement training, and economic development workshops.

The third key initiative is to maintain the integrity of an anti-discrimination and fraud enforcement program. In accordance with Section 287.0943(2), F.S., the Office of Supplier Diversity will conduct audits of certified minority businesses that meet the \$100,000 benchmark on an annual basis. The Office of Supplier Diversity will also conduct random audits of some of the remaining certified minority businesses. In addition, the Office of Supplier Diversity will be coordinating with agency Inspectors General as complaints of discrimination are filed against individuals or businesses.

FLEET MANAGEMENT & FEDERAL PROPERTY ASSISTANCE

AIRCRAFT MANAGEMENT

The mission is to deliver safe and efficient executive on-demand air travel for the Governor, Cabinet, and other state officials to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.

In accordance with Chapter 287.161, F.S., Aircraft Management is responsible for the management of state-owned and operated aircraft including operational and safety standards and assignment, use, and reporting policies and procedures. The service operates an Executive Aircraft Pool from a central aviation facility in Tallahassee. The Executive Airpool provides on-demand executive air transportation to the Governor, Cabinet Officers, and other high level officials and employees on a priority first call, first serve basis. The Executive Aircraft Pool provides transportation to destinations throughout Florida, including cities with limited or nonexistent commercial airline service, and to numerous cities outside the State. The Executive Aircraft Pool also provides support for the State Emergency Operations Center and state executives in times of disaster such as hurricanes, tornadoes, floods, etc. In addition, Aircraft

Management provides state agencies technical assistance, guidance and support in the acquisition, use, operations, maintenance, overhaul and disposal of aircraft.

The aircraft pool is supported by an aircraft maintenance facility and aircraft mechanics that are required to provide timely and quality repairs and service to the pool aircraft in the Executive Aircraft Pool. The current fleet is aging. Two of our aircraft have exceeded the national average for flight hours. There are ever increasing maintenance costs as well as increasing doubts of secure aircraft. A plan for life-cycling needs to be implemented. The Division is reviewing options and impacts to determine the most viable course to take.

MOTOR VEHICLE and WATERCRAFT MANAGEMENT

The mission is to deliver safe and efficient vehicles and watercraft including acquisition, tracking, and disposal to state agencies to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.

In accordance with Chapter 287, Part II, F.S., Motor Vehicle and Watercraft Management manages the acquisition, operation, maintenance, and disposal of the state's fleet of motor vehicles and watercraft. The state's fleet includes approximately 25,000 units. Responsibilities of this program area include developing policies and practices for effective and efficient acquisition, assignment, use, maintenance and disposal of vehicles and watercraft. In addition, Motor Vehicle and Watercraft Management determines motor vehicles and watercraft to be included on state contracts; develops technical bid specifications; and assists in evaluating the contracts. This area ensures the cost-effective acquisition of safe, energy-efficient and quality vehicles and watercraft. This service also approves the purchase of vehicles and watercraft, develops equipment purchase approval guidelines, develops fleet replacement criteria, and administers the state's federally mandated alternative fueled vehicles program. In addition, Motor Vehicle and Watercraft Management provides an Equipment Management Information System and reporting system that provides the management and cost information required to effectively and efficiently manage the state's fleet and provides accountability of equipment use and expenditures.

The service also manages the disposal annually of approximately \$5 million of used and surplus state vehicles and watercraft to ensure the state receives the maximum feasible return from disposal. Additionally, Motor Vehicle and Watercraft Management develops and administers the state's fuel and fleet credit card program (Voyager). This allows state employees to purchase gas in their state-owned vehicles when traveling. The Bureau also administers the rental vehicle contract. This contract is used statewide to assist in transportation needs of state employees. State employees pay 50% of the average price for a private rental vehicle.

Motor Vehicle and Watercraft Management anticipates demand for the acquisition of vehicles and watercraft to decline slightly this year and in future years as the size of state government is reduced due to efficiencies and privatization.

FEDERAL PROPERTY ASSISTANCE

The mission is to deliver as much federal surplus property as possible to Florida non-profits, political subdivisions and law enforcement to enable the Division of Fleet Management & Federal Property Assistance to provide exceptional service.

Pursuant to Chapter 217.03, F.S., and EO #77-36, 40 USC 203.10 USC 2573 (A), Federal Statutes, Federal Property Assistance is responsible for acquiring and distributing federally owned tangible personal property declared excess/surplus to the needs of the Federal government and allocated to the State of Florida for the benefit of the citizens of Florida through public agencies and private/nonprofit health and education organizations. This service is being provided by a government entity because it is non-profit and assists only those other organizations within the scope of various levels of government and education. Federal Property Assistance reviews available assets physically on-site at military and Federal civilian agency holding depots. The program also utilizes web-accessible surplus/excess databases of the U.S. General Services Administration (USGSA) and the U.S. Defense Logistics Agency. Acquisition of federal surplus equipment and supplies by eligible organizations results in major cost avoidance in asset procurement, which translates into tax dollar savings. In fiscal year 01-02, we distributed over 17 million dollars (acquisition cost) worth of federal surplus property to eligible donees across Florida.

Similarly, Federal Property Assistance is also responsible for acquiring and distributing U.S. Department of Defense owned tangible personal property declared excess to the needs of the military and approved for the State of Florida for the benefit of state and local law enforcement agencies. Federal Property Assistance has created state/local government partnerships to review available assets physically on-site at military holding depots and to transport those approved by the U.S. Department of Defense for Florida law enforcement agencies to the distribution center in Florida. Acquisition of military excess through the program by state and local law enforcement agencies results in major cost avoidance, which translates into tax dollar savings. The program also enables agencies to have equipment they may otherwise not have the resources to purchase.

Federal Property Assistance programs are now housed in one facility. The new 1122 Program that provides for our statewide law enforcement entities to procure new equipment from Federal GSA contracts is housed in the Orange County Sheriff's Office. Our department has oversight and audit authority only. We have not gathered enough data to provide a fiscal year savings for law enforcement, but will do so when available.

Workforce Program

Trends and Conditions Statement

HUMAN RESOURCE MANAGEMENT

The mission of Human Resource Management is to provide innovative, timely and cost effective human resource services and solutions in order to deliver a customer focused agenda to all stakeholders.

In accordance with Section 20.04, Chapter 110, Parts I, VI and VIII of Chapter 112, Florida Statutes, and Sections 215.94 and 216.262 Florida Statutes, Human Resource Management develops and supports a human resource infrastructure designed to recruit, retain, reward and recognize a high performance workforce for the State of Florida's State Personnel System. This system of approximately 118,000 positions, or 70% of the total state government workforce, is comprised of the Career Service, Selected Exempt Service and Senior Management Service pay plans within the Executive Branch of government. The remaining 30% is represented by the other six personnel systems: the Legislature, State Courts, Justice Administration, State University System¹, Auditor General and the Florida Lottery.

Human Resource Management strives to make the State of Florida a competitive employer, capable of recruiting and retaining the best and brightest employees. This is accomplished through the development and enhancement of core human resource policies, practices and strategies for the majority of the executive branch agencies. These policies, practices and strategies are designed to provide the best customer service and efficient and effective business solutions for managing a dynamic workforce. Specific functions include:

- Providing technical assistance and consultative services to help agencies administer effective and efficient human resource programs;
- Reviewing and approving changes to agency human resource management programs for compliance with laws, statutes and rules;
- Developing personnel rules, manuals, guidelines and forms for agency managers and employees;
- Establishing and maintaining a classification and compensation program addressing all Career Service, Selected Exempt Service and Senior Management Service positions;
- Establishing and maintaining a personnel information system for authorized and established positions;
- Developing a performance evaluation system designed to provide the basis for evaluating and improving the performance of the state's workforce;
- Providing access to training and professional development opportunities for employees, supervisors and managers;

- Administering the adoption benefits program to establish policies and procedures, determine applicant eligibility and award benefits;
- Implementing best practices, streamlining human resource processes, and eliminating inefficiencies in the delivery of services; and
- Researching, compiling and analyzing statistical information for use by division professionals, agency staff, the Legislature, other states and the public.

It is our goal to make the State Personnel System the model human resource system for the public sector. Through partnerships with entities from the private and public sectors, Human Resource Management will continue to research and analyze trends, innovations and best practices and incorporate these into key human resource policies, practices and strategies to ensure the effective management of the State's most valuable resources.

Human Resource Management has established key priorities to attain its goal. The successful completion of these priorities will allow the State to become the employer of choice while enabling state agencies and employees to deliver the Governor's priorities to the people of Florida. A summary of the key priorities is as follows:

- Maintain and enhance the broadband classification and compensation system to optimize management flexibility, organizational effectiveness and human resource management;
- Provide a professional development program to senior managers for the systematic development of managerial, executive, or administrative skills to ensure effective management of the state's human resources;
- Enhance strategies for assessing, improving and rewarding employee performance and initiating career pathing and enhancement plans for each employee;
- Streamline and improve work processes to increase productivity and efficiency while fully harnessing the power of technology;
- Provide workforce-related information for trend analyses and effective human resource decision-making;
- Administer the contract for the People First Project, formerly known as the Human Resource Outsourcing project, to enhance services and employee's and manager's access to state-of-the-art technology; and
- Assist agencies with workforce transition and placement of affected employees to ensure a smooth transition for agencies and employees adversely affected by a workforce reduction.

These process improvement strategies, as well as those designed to increase employee effectiveness and efficiency, will result in a smaller, more productive workforce. These priorities are aligned with and support our focus on providing innovative, timely and cost effective human resource services and solutions. The Division strives to identify and incorporate enhancements to the human resource infrastructure to make managing the State's human resources easier and more

effective. To assess Human Resource Management's performance in this effort, the outcome measure, "Overall Customer Satisfaction Rating," was developed. This measure reflects the ultimate impact of the products and services provided and relates directly to the Division's mission "to provide innovative, timely and cost effective human resource services and solutions in order to deliver a customer-focused agenda to all stakeholders," which in turn will help us achieve the Department's mission which is "to be a customer focused agency, providing efficient and effective services in order to better enable state agencies and employees to deliver the Governor's priorities to the people of Florida." A 96 percent overall customer satisfaction rating is projected for each year over the next five years and is representative of previous ratings received from customer agencies.

¹ Effective January 7, 2003, each state university is now considered a public body corporate as prescribed by Section 1001.72, Florida Statutes.

AMERICANS WITH DISABILITIES ACT WORKING GROUP (ADA)

ADA compliance is a foundation of all customer service initiatives implemented by DMS in order to enable state agencies, employees and ADAWG customers to deliver or benefit from the Governor's priorities.

The Americans with Disabilities Act (ADA) Working Group was recreated by Executive Order (03-137) and is maintained to encourage a cooperative effort of compliance with the ADA between state and local governments, the education community, the business community, the private sector, and the community of people with disabilities. In this collaborated effort, the ADA Working Group is charged with providing information, referrals, education, and recommendations for compliance and implementation of the ADA in order to increase the independence and quality of life for citizens of Florida with disabilities. The ADA Working Group's activities and areas of focus are on employment, public accommodations, transportation, state and local government services, telecommunication, as well as federal and state court decisions affecting the structure, enforcement, or any other aspect of the ADA, legislation at the federal and state level, and all disability rights laws affecting persons with disabilities in the State of Florida.

The ADA Working Group board members meet quarterly and hold a public hearing at each meeting. These meetings are held across the state in order to allow easy access to government. The public hearings function as the tool to acquire input from all aspects of the community, especially people with disabilities and their families. The input from the public serves as the tool to advise the Governor and others on issues facing people with disabilities and state compliance under the ADA.

The ADA Working Group's plan to accelerate ADA compliance in Florida is outlined by six methods that include:

- Reimplementation of quarterly ADA Coordinator networking meetings for state ADA Coordinators, and the creation of a certification process to improve classification status and importance of their role in the state workforce.
- Submit recommendations regarding necessary changes to statutes, administrative rules, policies, and/or procedures of the state in order to remove any conflicts with the ADA, remove any negative or derogatory references towards people with disabilities, and establish a coordinated system to receive requests for alternative formats, production, and dispersion in a cost-effective, simplified manner.

- Continue complaint resolution (complaint investigation) activities.
- Continue educational seminars on the ADA and related topics throughout the State of Florida. Implement a biennial statewide training by offering continued education credits to licensed professional in the areas of building construction, rehabilitation counseling, educators and law.
- Continue collaboration with the State Technology Office in pursuing further accessibility compliance in the design and purchasing of electronic methods of communication.
- Provide the leadership in formulating the state's plan for compliance with the Olmstead decision.

(See Real Choice Partnership Project).

CLEARINGHOUSE ON DISABILITY INFORMATION PROGRAM

The Clearinghouse on Disability Information Program was created by Executive Order 03-137 as a commitment to the concepts, duties, responsibilities and functions of the information and referral services created by House Bill 1519; building upon the leadership and activities of the Americans with Disabilities Act (ADA) Working Group. Expanding services to people with disabilities has been one of the Governor's highest priorities. The purpose of the Clearinghouse is to eliminate the confusing and expensive process of calling various state departments and agencies to acquire information on disabilities and services. The goal is to make information on all resources for persons with disabilities easily available and readily accessible.

The Clearinghouse is a comprehensive, efficient "one-stop" central point of contact to access information and referral services for people with disabilities, families, agencies and providers of services. The Clearinghouse helps promotes the economic growth of Florida's state government and economic development organizations by bringing together a positive blend of resource materials needed to meet the needs of our disability population. Our program has linked individuals to needed community resources, provisions, services, and facilities.

REAL CHOICE PARTNERSHIP PROJECT

The ADA Working Group in September 2001 received a three-year two million dollar grant from the Centers for Medicaid and Medicare (CMS) to implement and administer Florida's Real Choice Partnership Project (RCP). The grant supports Florida's Olmstead movement and ties in President Bush's New Freedom Initiative for individuals with disabilities. The federal grant program creates effective and enduring improvements in community long-term support systems to enable children and adults of any age who have a disability or long-term illness designed to:

1. Live in the most integrated community setting appropriate to their individual support requirements and their preferences;
2. Exercise meaningful choices about their living environment, the providers of services they receive, the types of supports they use and the manner by which services are provided; and
3. Obtain quality services in a manner as consistent as possible with their community living preferences and priorities.

Florida's RCP Project grant proposal identifies and implements improvements in community long-term support systems to enable people who have a disability or long-term illness to live and participate in their communities. The grant's goals are summarized below:

Goal 1: The creation of linkages among the key stakeholders that will result in communication and coordination of services for people with severe disabilities and long-term illnesses.

Goal 2: Improve the delivery of services to consumers by increasing access to providers and streamlining the Aged and Disabled Adult Waiver, the Project AIDS Care Waiver, the Traumatic Brain Injury and Spinal Cord Waiver, and the Assisted Living for the Elderly Waiver.

Goal 3: The creation of a comprehensive single point of contact/inquiry for Floridians with disabilities and/or long-term illnesses, caregivers and service providers to obtain information and links to state and local resources.

Goal 4: The development of community capacity to assist people with disabilities and long-term illnesses to live in integrated community settings of their choice, when appropriate, will be demonstrated in 3 Florida Counties.

Florida's work is receiving statewide and national recognition. We actively participate in conferences, presentations, and public hearings with a variety of organizations across the state. The Florida program actively participates in national conferences, and national work group activities in housing, Medicaid Waivers, and Accessible Information Technology. We have been invited to participate in the national model community's initiative. Rutgers University in partnership with the Centers for Medicare and Medicaid Services, Department of Health and Human Services, manages these programs.

INSURANCE BENEFITS ADMINISTRATION

The mission of the Insurance Benefits Administration is to develop and offer a high-quality, competitive portfolio of employee benefit products and services which will enable the State to attract and retain a highly competent, efficient, and effective workforce, thereby enhancing support of the Governor's priorities.

In accordance with Chapter 110, Florida Statutes, the Insurance Benefits Administration offers and manages a comprehensive package of health and welfare insurance benefits, including flexible spending accounts, which allow active and retired state employees and surviving spouses the option to choose pre-tax and post-tax benefit plans that best suit their individual needs. Specific administrative functions include, but are not limited to, customer resource management, enrollment maintenance and eligibility determination, benefit plan analysis and product development, contract management, premium administration, financial management and information technology support. To enhance service levels and cost efficiency, certain administrative functions were outsourced in connection with the People First Project.

In order for the Department to attain its goal of attracting and retaining a high performance workforce for the State of Florida, insurance benefit options must meet the needs of a mobile workforce and provide the flexibility needed to accommodate the demographic and social changes in the workforce. The Insurance Benefits Administration has established key priorities to ensure the continued design and alignment of health and welfare insurance benefits with currently accepted clinical and employee benefit practices, and to calibrate benefit design and alignment as a function of market trends and employee needs. The successful implementation and completion

of these key priorities will allow the State to be better positioned to attract and retain a high performance workforce. A summary of the key priorities is as follows.

- Analyze, recommend and implement a health insurance benefit design and long-term financing strategy that promotes greater employee choice, balanced with affordability and funding stability.
- Design and offer a fully insured long-term care insurance plan.
- Design and offer an integrated short-term and long-term group disability insurance plan.

RETIREMENT BENEFITS ADMINISTRATION

The Division of Retirement will deliver high quality, cost-effective statewide administrative retirement services to local and state government agencies and their employees and retirees in order for DMS to be recognized as a customer focused agency providing effective and efficient services.

In accordance with chapters 121, 122, 123, 175, 185 and 238, Florida Statutes, as well as sections 112.05, 112.363, 215.28, 250.22 and 650.06, Florida Statutes, the Division of Retirement, Department of Management Services, administers the state retirement plans, including the Florida Retirement System, the fourth largest public pension plan in the nation, comprised of 900,000 active and retired employees of 840 state, county, district school board, community college, city, and special district agencies. The Division also administers the State University System Optional Retirement Program, the Senior Management Service Optional Annuity Program, the Retiree Health Insurance Subsidy Program, the Municipal Police and Firefighters' Premium Tax Program, and provides oversight of local government pension plans.

The Division of Retirement successfully fulfills its mission to effectively and efficiently serve its customers, the members, retirees and employing agencies of Florida's State Retirement programs. The Division's continuing commitment to quality customer service is reflected in the recurrent high satisfaction ratings reported by our customers. Over the past several years, we have achieved an increase in the percentage of members satisfied with the Division's retirement services, improving our FY 1996-97 satisfaction level of 92.6% to 96.6% by FY 2001-02. Our focus on continual improvement in the quality and cost effectiveness of the services we deliver has brought significant benefits to those we serve. Following are highlights of customer service accomplishments achieved during the past FY 2002-2003:

- Assisted our employing agencies in achieving 100% compliance in electronically reporting monthly payrolls.
- Improved the timeliness of making employing agency contributions available for investment, benefiting both the Investment and Pension Plan, from 20 days to two days.
- Continued the legacy of processing the monthly Retired Payroll in a timely manner 100% of the time, while the growth of Retirees served increased by 10,000 in the past twelve months ended June 2003 to 210,000 monthly payees, representing an annual payroll of \$3.0 billion.
- Shepherded the first five-year class of Deferred Retirement Option Program (DROP) retirees through the retirement process. These employees elected retirement under the DROP program beginning July 1, 1998 when the program was instituted. Their decision to participate in this program allowed them to retire at the program's inception and begin accumulating monthly retirement benefits while they continued employment for an

additional 60 months before their agreed retirement in June 2003. The Division has carefully managed their concerns these past five years and has made every preparation to timely add them to the Retired Monthly Payroll in July 2003, which will increase the number of monthly benefit payees to over 217,000. It is expected that normal retirements and additional DROP retirements will increase the monthly-retired Payroll to more than 225,000 payees by June 2004, a 30% increase since June 1999.

- Reorganized Division staff to accommodate the recognized trend in the ever-increasing number of Retirees as a percentage of the total members served. Increasing the staffing resources available to manage the monthly Retired Payroll by almost 20%, while reducing the total number of Division staff, assures our Retirees that they will continue to receive a high level of attention and responsiveness to their needs.
- Initiated the development of significant enhancements to Retirement Online to provide additional value-added customer services. Originally deployed in July 2001, Retirement Online is the electronic gateway for members, retirees and employing agencies to access information and services from the Florida Retirement System through the Internet. Today, all 840 employing agencies use Retirement Online in some fashion, and more than 125,000 members, retirees, and DROP participants have logged in and used Retirement Online.
- Sustained the positive trend in improving response time required to answer customer requests for retirement estimates and other retirement information, which is currently less than 16 days average response time compared with over 60 days before implementation of the Division's state of the art imaging and workflow system.

The Division is able to sustain and accomplish these significant improvements by employing a highly motivated, educated and customer service oriented staff, empowered with an intimate knowledge of the workings of the Florida State Retirement system, and supported with capable and experienced management and a full functioning, Integrated Retirement Information System, representing the state of the art in imaging and workflow technology. This combination of quality resources has allowed the Division to accommodate the ongoing legislated changes to the Florida State Retirement programs which have dramatically increased in complexity in recent years with the advent of DROP and the Public Employees' Optional Retirement Program (PEORP), amidst increasing retirement membership and reductions in available appropriations and staffing.

The Division's vision to deliver customer service on demand is realized through the power of electronic technology. Retirement Online services provide the ability to expand customer services more efficiently. Retirement Online transforms many information service requests handled by Division staff to a customer self-service model designed to significantly reduce repetitive and administrative tasks while providing convenient customer service and information on demand. It reduces the amount of paperwork and file handling associated with the employer payroll reporting process and enables the Division to manage increasing workload demands from employers and their employees while maintaining or reducing current resource levels.

The Public Employees' Optional Retirement Program, enacted in 2000, is one of the largest and most significant State pension program changes in recent history. Effective in 2002, the Public Employees' Optional Retirement Program provides a self-directed defined contribution plan alternative to the existing Florida Retirement System defined benefit plan as a means to meet the needs of a changing, more mobile workforce in state and local government agencies. The successful implementation of the Public Employees' Optional Retirement Program in FY 2002-2003 required extensive involvement by the Division and the Program's continuance requires a major commitment to the cost and time needed for resource planning, document preparation and review, and systems evaluation and integration to assist the State Board of Administration in

carrying out its role under the plan. The Division also has a direct role in payroll processing, present value calculations, buy back amount calculations, information reporting, administration of disability and Health Insurance Subsidy for these members, Qualified Domestic Relations Order processing, responsibility for monitoring vesting requirements, rules development and co-responsibility in continued education and web site materials. The Division is greatly satisfied to have successfully integrated the many complexities of the Public Employees' Optional Retirement Program into its workflow processes without affecting its ability to sustain the high level of cost-effective services provided all its membership and employing agencies.

Technology Program (State Technology Office)

Trends and Conditions Statement

FUNDAMENTALS

~~IT IS THE BUSINESS OF THE STATE OF FLORIDA TO PROVIDE INFRASTRUCTURE, SERVICES AND INFORMATION REQUIRED TO SUPPORT AND IMPROVE THE OPPORTUNITY OF ALL FLORIDA'S CITIZENS, BUSINESSES AND INSTITUTIONS. THE SUCCESS OF FLORIDA AND ALL FLORIDIANS IS DEPENDENT UPON THE STATE'S ABILITY TO DESIGN, IMPLEMENT AND OPERATE INFORMATION TECHNOLOGIES AND APPLICATIONS. WE MUST DO THESE THINGS MORE EFFICIENTLY, EFFECTIVELY AND COMPETITIVELY.~~

~~EQUALLY URGENT IS FLORIDA'S NEED TO REDUCE THE COST AND ROLE OF GOVERNMENT. THIS REQUIRES THE STATE TO FOCUS AND ACCELERATE ITS TRANSITION TO THE POWERFUL ENTERPRISE BUSINESS TECHNOLOGIES, TOOLS, STANDARDS AND MODELS ALREADY PROVEN IN THE GLOBAL BUSINESS MARKETPLACE. THAT, IN TURN, DEPENDS ON HAVING A REAL AND COMPLETE KNOWLEDGE OF ALL INFORMATION TECHNOLOGY (IT) COSTS IN EACH DEPARTMENT AND EVERY AGENCY. THIS IS ESSENTIAL TO UNDERSTAND AVAILABLE OPPORTUNITIES, AS WELL AS THE TRUE COST OF CHANGE.~~

Information is a strategic asset of the State. As such, it should be managed as a valuable resource that is always secure, accessible, highly available and interoperable. ~~But this is neither automatic nor easy. It is not a simple matter of reducing costs and optimizing business processes.~~ The success of Florida and all Floridians is dependent upon the ability of the State to design, implement, and operate information technology and applications more efficiently, effectively, and competitively.

Today, even as we work to enable a greater "MyFlorida Enterprise," the majority of the State's technology assets continue to be built and maintained by individual agencies utilizing non-standard internal processes and practices. Until the State removes the barriers to interoperability and data sharing between agencies, it ~~beis~~ increasingly difficult to assure security and safety for its children and families.

~~Today, even as we work to enable "a greater MyFlorida Enterprise", the majority of State's technology assets continue to be built and maintained by individual agencies utilizing non-standard internal processes and practices. Until the State removes the barriers to interoperability and data sharing between agencies, Florida will find it will be increasingly difficult to assure the security and safety for its of Florida children and families.~~

IT Trends and Opportunities

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Information Technology is essential to successful transformation of traditional state government services into a digital government, and offering e-government services to state agencies, citizens and businesses. As the world of technology matures and "the fog of change" lifts, however, IT is becoming a commodity. IT costs are dropping, despite increased functionality, as users force providers to move from proprietary technologies to off the shelf components and open standards.

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Open source technology is another cause of reduced IT costs. Customer demand and major provider support (IBM, SAP, PeopleSoft, Sun and Oracle) has accelerated use of Linux. Gartner Group now rates Linux as becoming recognized as a mainstream enterprise technology. Careful use of open source elements significantly decreases vendor independence and reduces Total Cost of Operation (TCO) for IT.

IT buyers are shifting investments from stand alone and best-of breed applications to enterprise frameworks and services to improve interoperability, integration, convergence and collaboration. Collaborative IT management is seen as the critical enabler of both lower IT costs and increased productivity. Extended enterprise strategies for IT — In sourcing, Outsourcing, Application Service Providers (ASPs) and Business Service Providers (BSPs) — are being more widely adopted.

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The public sector is following the private sector in forming broader alliances and strategic partnerships with providers to improve performance and reduce over all costs. Public entities are expanding the use of public/private alliances and shared savings models to reduce investments and better leverage continued reductions in technology cost.

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Web services accessed through enterprise portals are becoming the preferred model for providing and accessing services. Web services are being made more robust and secure. All provider strategies now lead to web-based services and platforms. Virtual structures continue to replace and reduce physical IT assets and investments.

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Security is recognized as mission critical for all organizations. Users are postponing spending on new opportunities to focus on reducing vulnerabilities. Technology providers are meanwhile implementing next generation technologies from a "security first" perspective.

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STATE TECHNOLOGY OFFICE ~~State Technology Office~~

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Florida's The State Technology Office (STO) was established to enable Florida the State to shift technology planning and spending from a ~~costly~~ single agency focus to a broader and more efficient statewide enterprise perspective. The Florida Legislature defined this role in 2001 when it modified Chapter 282, Florida Statutes, to charge the STO with "adopting rules, implementing policies and procedures, and providing best practices to be followed by agencies in acquiring, using, upgrading, modifying, replacing, or disposing of information technology." Governor Bush further refined the STO's focus with his vision of "enabling the enterprise."

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Today (The STO works with the Office of the Governor, OPB and state agencies) Agencies to:

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- Align State technology with agency business requirements;
- Define Florida's enterprise technology framework and standards;

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- Provide the roadmap and oversight for enterprise integration;
- Drive consolidation and sharing of IT services;
- Move to an IT Utility business model;
- Manage provisioning and product delivery for cost, speed and quality;
- Create public/private alliances to lower the cost and role of government.

The STO is doing this by establishing The STO is establishing an enterprise framework (MyFlorida Enterprise) to define for how applications are built, how data is structured and used, and how networks communicate. The enterprise framework includes architectural, standards, policy and procedures, and IT investment management committees.

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The STO is working to:

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- Align State technology with agency business requirements;
- Define Florida's enterprise technology framework and standards;
- Provide the roadmap and oversight for enterprise integration;
- Drive consolidation and sharing of IT services;
- Move to an IT Utility business model;
- Manage provisioning and product delivery for cost, speed and quality; and
- Create public/private alliances to lower the cost and role of government.

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The STO has launched an enterprise architecture prototype team to accelerate the State's efforts in defining a working architectural model for the MyFlorida Enterprise. This is needed to guide provisioning negotiations with State vendors. Defining a road map to a working Enterprise Information Layer is a critical part of this effort.

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(intro ITN 006, 007, and 008 here)

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MYFLORIDA ALLIANCE

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The MyFlorida Alliance initiative initiative will establish is a public/private alliance partnership formed as a result of ITN 006. The initiative reflects the aligning of the State's business requirements with proven IT industry practices and a more cost effective model for delivering State services. MyFlorida Alliance mirrors the growing use of strategic alliances between corporate enterprises and technology providers to improve services, while sharing risk and savings.

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ITN 006 This will enables the State to offer shared Enterprise-Class services provided through an IT Utility model. It reduces State investment IT investments in technologies and FTEs, while increasing Florida's agility to change and improve services for the sState, its citizens and businesses. This innovative alliance is the first to combine the power of two prime vendors. It offers other states a new leadership model for leveraging the extended enterprise for IT.

The STO contracted with the two winning bidders for the selection of for the role of prime technology providers partner(s) to establish the BearingPoint and Accenture, to oversee over 30 subcontractors, including most of the State's traditional technology vendors. The alliance. The State Technology Office maintains responsibility for design, delivery, oversight and success of State IT services, while partners BearingPoint and Accenture take over day to day provision of services. Accenture is responsible for customer facing services. BearingPoint is responsible for traditional back office IT services.

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~~Members of the State's IT teams are either remaining with the STO to provide executive functionality or are moving with their application to become employees of external technology vendors. The State's Shared Resources Center will be leased to the prime contractors for seven years. BearingPoint and Accenture will fund all needed improvements, which will later become property of the State.~~

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KEY ENTERPRISE INITIATIVES

The State Technology office has focused its initial efforts for moving to an enterprise approach by defining six critical enterprise initiatives in 2002-2003. ~~Most have been integrated into the new IT Utility model addressed in ITN 006 and ITN 007.~~

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ENTERPRISE PORTAL – MYFLORIDA.COM Enterprise Portal – MyFlorida.com

State users will be able to access all State information and services through MyFlorida.com, Florida's Enterprise Portal. It will provide Floridians with a single point of access and an improved, ~~totally~~ seamless experience when doing all their business with the State. ~~(prob should define seamless?)~~

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MyFlorida.com already offers "access made easy" to Floridians, visitors, businesses, and Florida government. Currently, it is an easy-to-use single point of access to content on more than 100 web sites statewide, housing more than 750,000 web pages. ~~One of the most technologically advanced state portals in the nation, the Enterprise Portal ranks in the Top Ten best government portals.~~

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The STO will continue to enhance MyFlorida.com and its content. But more importantly, the STO is designing all Florida's new enterprise applications and services to work through the portal. ~~The re-launch of Florida's official state web site, www.MyFlorida.com is scheduled for July 2003. This upgrade, aimed at improving the access of useful information and services for the citizens, businesses and state and local governments, is the first step aimed at re-vamping the entire MyFlorida.com portal.~~

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ENTERPRISE NETWORK – MYFLORIDANET

MyFloridaNet is replacing SUNCOM (the Statewide telecommunications network), which can no longer keep up with Florida's growth. ~~ITN 007 has been published, calling for vendors to provide a converged network using an IP backbone. Via the procurement process, this initiative establishes a public/private partnership which MyFloridaNet will offer data, voice, video and Internet all over a single IP network. But while the State will own the network, its services and functionality, it will not own any of the physical assets.~~

Equally importantly, MyFloridaNet will provide the foundation for all MyFlorida Enterprise Services, including all data and communications networking. It will provide both a resilient core design that gives the State a more flexible and efficient communication platform. MyFloridaNet will allow the State to better focus available budget dollars in critical program areas such as Homeland Security, Health and Human Services, and Education.

~~Convergence improves convenience for the State's users. But it also will help reduce costs. A single infrastructure will be able to handle multiple networks (new phrase). Convergence also~~

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increases the number of potential bidders, which increases our choice and our ability to find lower cost services.

ENTERPRISE TECHNOLOGY SERVICES DESK (ETSD)

The Enterprise Technology Services Desk was included in ITN 006. The ETSD offers an enterprise technology services desk capable of sharing data and trouble tickets across multiple agencies, applications and technologies. It is focused on solving State user problems, regardless of source, thereby maximizing customer service productivity in the most cost effective manner. The ETSD will grow to provide IT asset management, reporting, and capacity management capabilities on an enterprise-wide basis.

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The ETSD launched on February 28, 2003, with a new Pilot Agency fully trained. Four pilot agencies participated in the pilot in FY 02-03. Participating pilot agencies will be and integrated in approximately every 45 days thereafter. Pilot agencies are: Departments of Education, Juvenile Justice, Elder Affairs, Business & Professional Regulation, Management Services, and the State Technology Office. But a recent study found calls for help actually came from 31 different agencies. (rephrase, not sure about retaining this...the 31 may relate to suncom issues or other service types, not "I need desktop help"...Gina? Thoughts?)

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DATA CENTER CONSOLIDATION

Data Center Consolidation initiative also moves toward a public/private partnership. Data Center Consolidation is one of the most important elements addressed by ITN 006, will offering significant savings for the State. In the past, four Governor's agencies each operated independent mainframe data centers. Current data center operations within State agencies are isolated and self supporting. This autonomous approach translates into a multitude of high capacity, costly machines not fully utilized and, therefore, not reaching full cost effectiveness.

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Consolidation of data centers will reduce costs, improve IT service delivery, and enable the State to profit from the growing flexibility and lower cost of server virtualization.

Knowledge transfer and training of converged public and private server teams has already begun. We are completing a baseline determinations of the current data center environments are currently underway and include: of the current data center environment, including an inventory of mainframe hardware/software and data center facility hosting capabilities; a comparative costing analysis of data center facilities; and an analysis and determination of the most viable data center consolidation scenarios, or alternatives.

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ENTERPRISE PROCUREMENT

The STO's new STO governance model calls for a single point of procurement for State IT. ITN 006 is the first demonstration of the savings this model can deliver. The State can become a single customer with substantial leverage to drive the best deal for purchasing IT products, as well as enforcing consistency and quality of services.

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The STO will work with the agency heads Agencies to define the enterprise technologies required by agency business requirements. Leveraging buying power will lead to aggregated purchases and increased cost savings and avoidance. Product managers will oversee be guide delivery of all technology products, assuring compliance to agency cost and time targets. (are product managers doing this or customer service?)

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ENTERPRISE SECURITY

The STO has aggressively supported and provisioned two security initiatives to protect State information and IT assets. These are the Office of Information Security and the Florida Infrastructure Protection Center.

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The Office of Information Security (OIS) provides a single point of responsibility for securing information technology resources for the State of Florida. It guides and assists agencies in identifying and mitigating their vulnerabilities. OIS also develops and deploys enterprise information security policies and procedures. Standardized policies close potential gaps and thus reduce risk.

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Originally each State agency was responsible for security, but legislation in 2002 gave the State Technology Office the role of developing an enterprise approach to information security. This fiscal year, OIS will work with the agencies on best practices to assure that they maintain the baseline of information security required to secure their network. OIS is offering training in awareness and tools to assist agencies in securing their network. In addition, OIS works with state agencies in the area of Continuity of Operations Plan's and IT disaster recovery, as well as providing guidance on background checks on IT staff in critical areas.

The Florida Infrastructure Protection Center (FIPC) is a collaborative effort between the STO, the Florida Department of Law Enforcement, the National Guard, the Department of Community Affairs, and the Division of Emergency Management. Presidential Directive 63 (1993) defined its formation, calling for better public awareness of threats to the critical infrastructure. Through this initiative, the Computer Incident Response Team (CIRT), a statewide group of individuals, provides a resource for handling threats to our critical infrastructure threats, as well as assisting criminal investigations. The OIS will have taken the lead in assisting state agencies in establishing CIRTs and help with training their teams to respond to cyber threats.

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Other major projects are Statewide Law Enforcement Radio, HIPAA and the Digital Divide Council.

The Statewide Law Enforcement Radio System (SLERS) is providing Florida law enforcement with improved interoperability a state-of-the-art digital trunked simulcast 800-megahertz radio communications system. The new system can provide statewide mobile coverage and portable coverage in defined areas to Florida's state law enforcement agencies. The system also serves state and local law enforcement agencies through a mutual aid analog channel along with direct interoperability with third-party subscribers. This system is being developed through a public/private alliance that offers provides us broad capabilities and experience. When completed, this shared system will serve over 6,500 users with over 14,000 radios in patrol cars, boats, motorcycles, and aircraft wherever they are in the State.

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All state agencies are meeting 2003 deadlines for compliance. The STO has focused on helping the agencies develop in-house project management capabilities to meet HIPAA requirements on an on-going basis. The STO funded the assessment of compliance activities and has provided quarterly reports on compliance progress to the Governor's Office, President of the Senate, Speaker of the House, and Chairs of the House Fiscal Responsibility Council, and the Senate Appropriations Committee.

The Digital Divide Council did not receive funding for 2003-2004, but the Governor has identified this as an important area, which the STO will continue to support ~~once as~~ resources are identified. The Digital Divide Council's role (per F.S. 445.049) is to help assure that all Floridians have reasonable opportunities to utilize information technology resources and to receive training and support necessary to use computers and online services to assure opportunity and to enhance quality of life.

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The Council has concentrated its initial digital divide efforts on groups who are "underserved" today in terms of access to computers and the Internet, including Americans who have low incomes, live in rural communities, have limited education, and are members of racial or ethnic minorities. Activities from 2001, when support was initiated, through June of 2003, focused on three activities: (1) deploying pilot projects in six regions across the state to provide reasonable opportunities for computer and literacy education, training, and Internet access to at risk families and underserved communities, (2) establishing a clearinghouse of digital divide resources, and (3) improving the perception of technology through a marketing strategy, promoting the benefits of technology and empowering people to utilize it.

The Digital Design Council is currently evaluating what we have achieved and what needs to be done next. The Council will sponsor a Digital Design Summit for Florida in December 2003, to share and discuss the results.

PERFORMANCE REPORTING AND EVALUATION

The STO will be providing additional services to the State related to measuring and evaluating IT performance as part of a business-oriented approach. The STO will identify costs and benefits within our thean IT organization, because as this is essential crucial to performance management. Baselines, metrics, scorecards, surveys, and service agreements for use in goal setting and targeting areas for service improvements are essentialkey. By conducting recurring evaluations of its performance, the STO can support the development/ implementation of action plans to build on strengths and correct weaknesses.

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The STO has gathered baseline IT data to serve as the benchmark for product and services costs as the State moves to extended enterprise model. The new service contracts must proactively define service level agreements (SLAs) and also document past benchmarks. This is necessary where contracts call for sharing of savings generated through improved provision of State IT Services.

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MYFLORIDA SERVICES FOR CITIES & COUNTIES

Enterprise solutions and products developed for State agencies will also be offered to local government and non-profit entities. This will enable local governments to access the more efficient cost models of Florida's evolving IT Utilityenterprise approach. It will help support the expense of generating shared Enterprise-Class services by broadening the user base. Additionally, And it will improve alignment of state and local governments, thus accelerating our move to a

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“greater MyFlorida Enterprise.” ~~This program will be self funding, and not depend on funding by the legislature.~~

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Public Employees Relations Commission

Trends and Conditions Statement

Pursuant to Article I, § 6, and Article III, § 14, of the Florida Constitution, Chapter 120, Sections 110.227, 112.0455, 295.07-.11, and, principally, Chapter 447, Part II, Florida Statutes, the Public Employees Relations Commission (PERC) handles all cases involving public sector employment and labor law including certification and registration of unions, unfair labor practices, career service matters, drug-free workplace issues and veterans preference cases. Florida Statutes, § 187.201(21), provides that it is a state goal that government economically and effectively provide the amount and quantity of services required by the public. PERC helps the state achieve its goal by promoting harmonious management/employee relations. This is achieved by expeditiously resolving local and state government employment and labor law controversies in a fair and economical manner and by preventing work stoppages.

PERC is a quasi-judicial tribunal with the primary function of mediating and resolving labor/employment disputes among hundreds of thousands of state and local government employees, job applicants, and their public employers. The authority for quasi-judicial tribunals is contained in Article V, § 1, Fla. Const.

Specifically, in regulating collective bargaining, PERC acts as the neutral to mediate impasses and disputes, monitors those disputes possessing the potential to become strikes, prevents strikes and imposes punishment on strikers, if necessary. PERC ensures that public sector unions provide pertinent financial and officer disclosure through its licensing desk. It decides disputes concerning bargaining unit configuration/modification and alleged unfair labor practices involving state and local governments pursuant to legislative instructions and case precedent. PERC also issues declaratory statements to avoid future labor disputes and conducts elections throughout Florida for state and local government employees voting for establishing or maintaining union representation. These functions are constitutionally required. Art. I, § 6, Fla. Const.: Dade County CTA v. Legislature, 269 So.2d 684 (Fla. 1972).

PERC also acts as the neutral to mediate and, if necessary, decide career service disputes between state employees covered by civil service, and their employers. This function is constitutionally required. Art. III, § 14, Florida Constitution. In 1997, a blue-ribbon Legislative committee that would be recognized by this Administration determined that the Commission was a cost efficient means of providing this required due-process function. Also, in 2001 the Legislature thoroughly reviewed PERC and its various jurisdictions and made significant changes. (SB 466 – “Service First”)

PERC also mediates and, if necessary, decides employment disputes regarding drug testing, whistle-blower and forced retirement for state employees. It also decides veterans’ employment disputes for both state and local governments. Federal and state constitutional due process of law requires that these disputes be adjudicated by a neutral.

As with any quasi-judicial agency, it is difficult to predict with any degree of certainty the future demand for PERC’s services, since that demand is controlled by the advocates practicing before it. For the three-year period between 1996 and 1999, PERC had 1,334, 1,341, and 1,307 filings, respectively. Case filings were reduced in FY 1999-00 to 1,210 filings. This trend was repeated

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in FY 2000-01, and FY 2001-02, during which 1,229 cases and 1,150 cases were filed, respectively. In the first eleven months of FY 2002-03 case filings have again declined to 1,074.

An analysis of case filings reflects that there was a decrease of twenty-one percent in career service cases as of this date. The reduction in career service cases may be largely attributable to the major reforms in this area that were made through the Service First legislation in 2001. Significantly, this legislation removed attorney's fees and costs from being assessed when an employee is wrongfully disciplined, thereby eliminating the possibility for legal representation based upon a contingency fee arrangement. Some of the historical decrease is also a consequence of changes in what is considered to be inputs (filings) as defined in 1999 for performance based program budgeting.¹

The significant 2001 legislative revisions of Chapter 447, Part II, and Section 110.227, Florida Statutes, and the reorganization of State agencies occurring between 2000 and 2002, makes precise forecasting for the FY 2003-04 virtually impossible. It is very likely the past years will not provide a reliable base line due to the aforementioned legislative actions. Also, it should be recognized that labor activity has been affected by a number of factors, including the abolishment of the State Board of Regents, which had a number of certified bargaining agents throughout the statewide university system. Upon the implementation of the eleven separate board of trustees as independent public employers on January 7, 2003, significant labor activity occurred at those institutions and will continue to do so over the next several years. Specifically, there has been fifty-one labor cases involving the eleven boards of trustees in this fiscal year affecting thousands of employees. Furthermore, recent decisions of the Florida Supreme Court have expanded PERC's jurisdiction to cover deputized personnel, including deputy sheriffs, and attorneys employed by the State. This has resulted in the filing of thirty representation cases involving many thousands of sheriff department employees. Given these factors, we would generally predict an increase in labor cases over the next five years. The labor cases are publicly visible and thoroughly litigated. Thus, while the total number of cases has reduced in the past three fiscal years, the actual amount of work performed by the diminished PERC staff has actually increased.

Although data for the FY 2002-03 has not been completed at the present time, it appears that case filings during this fiscal year will be around 1,130, which is a reduction of approximately twenty cases.² This is a decrease in case filings of approximately two percent. This may or may not be statistically significant and, thus, it is assumed that filings will remain essentially the same, if no other factors were to be considered. However, due to the factors addressed above, it is anticipated that there will be an increase in labor filings of approximately five percent for each of the next five years. This five percent increase in case filings (inputs) will be reflected in a five percent increase in outputs (disposition of cases) over this five-year period. Thus, case outputs are projected as follows.

2004-2005 = 1,186
2005-2006 = 1,245
2006-2007 = 1,307

¹ In creating the measures and standards for performance based program budgeting, PERC eliminated the counting of special master cases, as these cases are largely privatized. Thus, we have corrected this document to delete these cases from the FY 1996-97, FY 1997-98, and FY 1998-99 totals.

² This projection is based upon case filings in July 2002 to predict filings in July 2003.

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2007-2008 = 1,372
2008-2009 = 1,441

These increases are applied to a baseline computed from the FY 2002-03 filings. (This is necessary as this year represents the caseload based on measures and standards established for Performance Based Program Budgeting requirements.)

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Correctional Privatization Commission

Trends and Conditions Statement

The mission of the Correctional Privatization Commission is to ensure that the private sector performs state services in the most effective, productive, and cost efficient manner for the citizens of the State of Florida.

Chapter 957, Florida Statutes, created the Correctional Privatization Commission (Commission) for the purpose of entering into contracts for the design, construction, and operation of privately operated correctional facilities. The Commission consists of five members who are appointed by the Governor for a term of four years. The Commission was established in 1993 and is administratively housed within the Department of Management Services.

Since 1993, the Legislature has authorized the Commission to finance and construct six correctional facilities. The Department of Juvenile Justice subleases and operates two of the six facilities, located in the Palm Beach and Polk Counties. Effective July 1, 1999, the Legislature transferred the operation of the Gadsden Correctional Facility (adult female) from the Department of Corrections (Department) to the Commission. The Gadsden facility was financed and constructed by the Department.

The Commission currently oversees the operation of the following facilities:

Number			
Facility	Type	of Beds	
Bay Correctional Facility	Adult male, medium security	750	
Moore Haven Correctional Facility	Adult male, medium security	750	
South Bay Correctional Facility	Adult male, close custody	1,318	
Lake City Correctional Facility	Youthful Offender	350	
Gadsden Correctional Facility	Adult female, medium security	1,040	
	Total Beds	4,208	

For each facility, the Commission has entered into an "Operations and Management Contract" with a private vendor to operate the facility for an agreed daily per diem. The contract provides for an annual inflation per diem increase, subject to appropriation by the Legislature. The contracted per diems include cost for the following operating expenditures: personnel, general operating expenditures, operating equipment, food services, medical services, maintenance and repair, educational programs, substance abuse programs, sales tax, salary and expenses of a Commission employed Contract Monitor position, property taxes or grants to the counties that have private prisons, and corporate taxes.

Funding to pay the Debt Service and operations per diem to vendors for the facilities listed above is appropriated in the Department's annual budget. The Debt Service of the two subleased facilities is appropriated in the Department of Juvenile Justice's budget. Funding of the Commission's employee salaries and other administrative cost is appropriated in the Department of Management Services' budget. The Commission has 8 authorized positions.

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Chapter 957.07, Florida Statutes, states that the Commission may not enter into a contract unless the Commission determines that the contract or series of contracts in total for the facility will result in a cost savings to the state of at least seven percent over the Department. The Commission is currently undergoing re-bid of the operations and management contracts at all five of our facilities. This is being done to ensure 7% cost savings through promoting competition between vendors and create innovative programs specifically designed for each individual facility.

Chapter 2001-379, Laws of Florida, established the Prison Per Diem Workgroup for the purpose of developing consensus per diem rates to be used when determining per diem rates of privately operated prisons. The Office of Program Policy Analysis and Government Accountability, the Office of the Auditor General, and the staff of the appropriations committee for both the House of Representatives and the Senate are the principals of the workgroup. The report of the Workgroup established the cost to operate public prisons and the Commission's per diem for all five facilities were at least 7% less than the established per diem to operate the public prisons.

The "Criminal Justice Estimating Conference" projects the number of beds that the Florida Prison System will need over the next five years. During the 2003 Legislative session, the Legislature directed the Commission to issue an invitation to negotiate to contract for 1,086 additional beds for expansion at existing private facilities. The Commission will diligently work to meet the February 2005 deadline for the new beds.

The Commission will continue to effectively monitor and oversee the operation of its existing five facilities and work with the Governor's Office and Legislature to construct new correctional facilities at the appropriate time. The Commission will also continue to create competition that will be of value to the State of Florida by inviting innovation by the contractors that will allow the State to glean operational strategies that provide alternatives to the standard operating procedures of the Department.

The Correctional Privatization Commission will ensure that innovative concepts are implemented in an effort to save the State additional funding by lowering recidivism rates and securing a productive future for the State. It is our goal to expand our cost savings and innovative methods in new facilities as deemed necessary by the Governor and Legislature.

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Florida Commission on Human Relations

Trends and Conditions Statement

Mission: To prevent unlawful discrimination by ensuring people in Florida are treated fairly and are given equal access to opportunities in employment, housing, and certain public accommodations; and promote mutual respect among groups through education and partnerships.

The Florida Commission on Human Relations (FCHR) was established in 1969. Throughout its thirty-four year history, the Commission has endeavored to serve Floridians by assuring equal protection against discrimination in employment, housing, and certain public accommodations. The Commission accomplishes its mission by enforcing the laws against discrimination, and educating businesses and citizens to avoid discriminatory practices.

The FCHR recognizes that the State of Florida will continue to become increasingly diverse and complex over the next 10 years. Currently, Florida ranks second only to California in diversity among states with large populations. According to the United States Census Bureau, the Hispanic population of Florida will more than double between 2000 and 2025, from 2.4 million to 4.9 million. During this same timeframe, Florida's minority population will increase from 5 million to 9.1 million, becoming 55 percent of the total population.

In addition to increasing in diversity, Florida also will continue to become complex in industry and technology. New industries and technologies have affected an expanding business environment to complement Florida's traditional focus on tourism and agriculture. The growth of high-tech businesses clustered around Florida's major universities is just one element in this growth. Another is the growth of web-related technical firms spurred on by the increasing use of the Internet to conduct business.

To meet Governor Bush's vision of "serving as an enabler to achieve the State's business goals and challenges, including a smaller, more effective, more efficient government," we are addressing the current inventory of cases, upgrading technological hardware and software, and reengineering our outreach program to increase dialog among diverse groups.

Currently, there are approximately 1,323 cases pending before the Commission that we are committed to resolving as soon as possible. To reduce the time it takes to respond to customers and eliminate the current backlog of pending cases, additional staff has been reassigned to our Investigations Unit. In order to become more effective in investigating and resolving allegations of discrimination, the Commission has implemented an on-site investigations team. On-site investigations are essential to the investigative process. Investigators evaluate firsthand the conditions under which the alleged discrimination occurred; they travel to various locations as they investigate cases to meet with the parties associated with a discrimination case face-to-face. These opportunities assist investigators in conducting a more prompt, thorough and detailed investigation.

Since 1998, the Commission has been using a nationwide computer system administered by the Equal Employment Opportunity Commission. This system is neither user-friendly nor does it allow states to customize applications to meet their demands. In Fiscal Year 01-02, the

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Legislature appropriated budget to allow the Commission to build Phase I of a Web-based system consisting of a new case-management system, online technical and administrative assistance, and other attributes to help increase our ability to serve the public. We know that much of the paperwork that we handle can be reduced through electronic workflow and document processing. Because of the implementation of the new web-based case management system and the internal reorganization of staff we anticipate that the percent of cases resolved within 180 days will increase over the next 5 years from 59% (FY 2000-01) to 90% (FY 2005-2006).

Our web-based system will have direct relevance to employers. We will provide a best practices database accessible through the Internet that will enable employers to review examples and procedures and hopefully reduce discriminatory behavior. We want to work with employers in a cooperative spirit to demonstrate that fair and equal treatment of their employees is essential to a productive workforce. While cultural diversity is positive, it can also create problems in that different ethnic groups, races, religions may view others with suspicion. Suspicion leads to fear and often to anger, which can result in harmful actions. Discrimination is increasing throughout Florida in the areas of employment, housing, lending practices, and institutional processes thereby denying some Floridians access and opportunity. Our challenge and opportunity is to use our limited resources to defuse potential discriminatory situations by working with community groups and others to educate Floridians on the positive values associated with equal treatment for all. The Commission's initiatives focus on joining forces with communities, organizations, businesses, education groups, advocacy groups, and local, state, and federal governments. A primary initiative, introduced in 2003, is to bring the operations of the Commission closer to Florida's residents as part of an outreach program that coincides with Commission meetings held across the state. Informational and educational workshops and other events presented in conjunction with Commission meetings gave residents an opportunity for face-to-face interaction with the Commission and Commissioners.

During the year, FCHR underscored its commitment to "Building Inclusive Communities" by taking its services directly to the people. FCHR met with business and community leaders and held forums to facilitate discussion of problem solving. The Commission also plans to take a proactive role in being alert to situations before they materialize as discriminatory events. This will be accomplished through a variety of mechanisms, some of which are linked to the proposed web-based system. Working with libraries and community groups throughout Florida, we will publicize our web-based system and its capabilities to provide educational information to employers, employees and housing providers. Working with colleges and universities in Florida, we will conduct random sampling to identify potential problem areas and to ascertain how the public views the work of the Commission. Working with employers and community groups, we will conduct a series of workshops and forums in key areas of the State to focus on efforts to reduce inter-group tensions, thus promoting positive relations throughout Florida communities.

To meet Governor Bush's vision of a smaller, more effective, more efficient government and to meet our mission, the Commission continues to advance technology, reorganize internally, and create community partnerships. Through our community initiatives, we will focus on the essential element of our mission -helping people in Florida achieve their full potential in a society that values equality and human rights.

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Appendix - Glossary of Terms and Acronyms

Activity: A set of transactions within a budget entity that translates inputs into outputs using resources in response to a business requirement. Sequences of activities in logical combinations form services. Unit cost information is determined using the outputs of activities.

Actual Expenditures: Includes prior year actual disbursements, payables and encumbrances. The payables and encumbrances are certified forward at the end of the fiscal year. They may be disbursed between July 1 and December 31 of the subsequent fiscal year. Certified forward amounts are included in the year in which the funds are committed and not shown in the year the funds are disbursed.

Appropriation Category: The lowest level line item of funding in the General Appropriations Act which represents a major expenditure classification of the budget entity. Within budget entities, these categories may include: salaries and benefits, other personal services (OPS), expenses, operating capital outlay, data processing services, fixed capital outlay, etc. These categories are defined within this glossary under individual listings. For a complete listing of all appropriation categories, please refer to the ACTR section in the LAS/PBS User's Manual for instructions on ordering a report.

Baseline Data: Indicators of a state agency's current performance level, pursuant to guidelines established by the Executive Office of the Governor in consultation with legislative appropriations and appropriate substantive committees.

Budget Entity: A unit or function at the lowest level to which funds are specifically appropriated in the appropriations act. "Budget entity" and "service" have the same meaning.

CIO: Chief information Officer

CIP: Capital Improvements Program Plan

D3-A: A legislative budget request (LBR) exhibit which presents a narrative explanation and justification for each issue for the requested years.

Demand: The number of output units which are eligible to benefit from a service or activity.

EOG: Executive Office of the Governor

Estimated Expenditures: Includes the amount estimated to be expended during the current fiscal year. These amounts will be computer generated based on the current year appropriations adjusted for vetoes and special appropriations bills.

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FCO: Fixed Capital Outlay

FFMIS: Florida Financial Management Information System

Fixed Capital Outlay: Real property (land, buildings including appurtenances, fixtures and fixed equipment, structures, etc.), including additions, replacements, major repairs, and renovations to real property which materially extend its useful life or materially improve or change its functional use, and including furniture and equipment necessary to furnish and operate a new or improved facility.

FLAIR: Florida Accounting Information Resource Subsystem

F.S.: Florida Statutes

GAA: General Appropriations Act

GR: General Revenue Fund

Indicator: A single quantitative or qualitative statement that reports information about the nature of a condition, entity or activity. This term is used commonly as a synonym for the word “measure.”

Information Technology Resources: Includes data processing-related hardware, software, services, telecommunications, supplies, personnel, facility resources, maintenance, and training.

Input: See Performance Measure.

IOE: Itemization of Expenditure

IT: Information Technology

Judicial Branch: All officers, employees, and offices of the Supreme Court, district courts of appeal, circuit courts, county courts, and the Judicial Qualifications Commission.

LAN: Local Area Network

LAS/PBS: Legislative Appropriation System/Planning and Budgeting Subsystem. The statewide appropriations and budgeting system owned and maintained by the Executive Office of the Governor.

LBC: Legislative Budget Commission

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Legislative Budget Commission: A standing joint committee of the Legislature. The Commission was created to: review and approve/disapprove agency requests to amend original approved budgets; review agency spending plans; issue instructions and reports concerning zero-based budgeting; and take other actions related to the fiscal matters of the state, as authorized in statute. It is composed of 14 members appointed by the President of the Senate and by the Speaker of the House of Representatives to two-year terms, running from the organization of one Legislature to the organization of the next Legislature.

LBR: Legislative Budget Request

Legislative Budget Request: A request to the Legislature, filed pursuant to s. 216.023, Florida Statutes, or supplemental detailed requests filed with the Legislature, for the amounts of money an agency or branch of government believes will be needed to perform the functions that it is authorized, or which it is requesting authorization by law, to perform.

L.O.F.: Laws of Florida

LRPP: Long-Range Program Plan

Long-Range Program Plan: A plan developed on an annual basis by each state agency that is policy-based, priority-driven, accountable, and developed through careful examination and justification of all programs and their associated costs. Each plan is developed by examining the needs of agency customers and clients and proposing programs and associated costs to address those needs based on state priorities as established by law, the agency mission, and legislative authorization. The plan provides the framework and context for preparing the legislative budget request and includes performance indicators for evaluating the impact of programs and agency performance.

MAN: Metropolitan Area Network (Information Technology)

NASBO: National Association of State Budget Officers

Narrative: Justification for each service and activity is required at the program component detail level. Explanation, in many instances, will be required to provide a full understanding of how the dollar requirements were computed.

Nonrecurring: Expenditure or revenue which is not expected to be needed or available after the current fiscal year.

OPB: Office of Policy and Budget, Executive Office of the Governor

Outcome: See Performance Measure.

Output: See Performance Measure.

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Outsourcing: Describes situations where the state retains responsibility for the service, but contracts outside of state government for its delivery. Outsourcing includes everything from contracting for minor administration tasks to contracting for major portions of activities or services which support the agency mission.

PBPP/PB2: Performance-Based Program Budgeting

Pass Through: Dollars that flow through an agency’s budget for which the agency has no discretion with respect to spending or performance. Examples of pass throughs include double budget for data centers, tax or license for local governments, WAGES contracting, etc.

Performance Ledger: The official compilation of information about state agency performance-based programs and measures, including approved programs, approved outputs and outcomes, baseline data, approved standards for each performance measure and any approved adjustments thereto, as well as actual agency performance for each measure

Performance Measure: A quantitative or qualitative indicator used to assess state agency performance.

- Input means the quantities of resources used to produce goods or services and the demand for those goods and services.
- Outcome means an indicator of the actual impact or public benefit of a service.
- Output means the actual service or product delivered by a state agency.

Policy Area: A grouping of related activities to meet the needs of customers or clients which reflects major statewide priorities. Policy areas summarize data at a statewide level by using the first two digits of the ten-digit LAS/PBS program component code. Data collection will sum across state agencies when using this statewide code.

Privatization: Occurs when the state relinquishes its responsibility or maintains some partnership type of role in the delivery of an activity or service.

Program: A set of activities undertaken in accordance with a plan of action organized to realize identifiable goals based on legislative authorization (a program can consist of single or multiple services). For purposes of budget development, programs are identified in the General Appropriations Act for FY 2001-2002 by a title that begins with the word “Program.” In some instances a program consists of several services, and in other cases the program has no services delineated within it; the service is the program in these cases. The LAS/PBS code is used for purposes of both program identification and service identification. “Service” is a “budget entity” for purposes of the LRPP.

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Program Purpose Statement: A brief description of approved program responsibility and policy goals. The purpose statement relates directly to the agency mission and reflects essential services of the program needed to accomplish the agency's mission.

Program Component: An aggregation of generally related objectives which, because of their special character, related workload and interrelated output, can logically be considered an entity for purposes of organization, management, accounting, reporting, and budgeting.

Reliability: The extent to which the measuring procedure yields the same results on repeated trials and data are complete and sufficiently error free for the intended use.

Service: See Budget Entity.

Standard: The level of performance of an outcome or output.

STO: State Technology Office

SWOT: Strengths, Weaknesses, Opportunities and Threats

TCS: Trends and Conditions Statement

TF: Trust Fund

TRW: Technology Review Workgroup

Unit Cost: The average total cost of producing a single unit of output – goods and services for a specific agency activity.

Validity: The appropriateness of the measuring instrument in relation to the purpose for which it is being used.

WAGES: Work and Gain Economic Stability (Agency for Workforce Innovation)

WAN: Wide Area Network (Information Technology)

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