Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date  2. Department
4/26/18  California Department of Technology

3. Organizational Placement (Division/Branch/Office Name)
Office of Statewide Project Delivery/California Project Management Office

4. CEA Position Title
Deputy Director, California Project Management Office

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)
The California Department of Technology (CDT) is requesting approval to establish the Deputy Director for the California Project Management Office (CA-PMO) at the CEA level. The CEA is responsible for the Statewide Project Management Office (PMO) and is a member of the California Department of Technology’s executive staff. The Deputy Director, CA-PMO is responsible for improving the efficiency and effectiveness of California state government’s management of Information Technology (IT) projects, and improving the overall success of the State’s IT project portfolio.

6. Reports to: (Class Title/Level)
Deputy Chief Project Officer/CEA C

7. Relationship with Department Director (Select one)

☑ Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.

☐ Not a member of department’s Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): 

8. Organizational Level (Select one)

☐ 1st  ☐ 2nd  ☐ 3rd  ☐ 4th  ☐ 5th (mega departments only - 17,001+ allocated positions)
B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

The Deputy Director, CA-PMO will be responsible for improving the efficiency and effectiveness of California State government’s management of Information Technology (IT) projects and improving the overall success of the State’s IT project portfolio.

The position will oversee and direct project management services delivery that includes direct management of subordinate CDT Project Management and Consulting staff (IT Managers) delivering services to State of California departments toward the successful delivery of projects. In addition, the position will ensure that CDT effectively provides project and portfolio management leadership, expertise, experience, and training required throughout the project management life cycle for projects.

The position will develop, implement and maintain statewide project and portfolio management policy, methodology and standards to strengthen and mature project and portfolio management practices and successes toward the achievement of the State’s business strategies. The position will be responsible for development of strategies and tactical plans which provide for the continued maturation of statewide project management and portfolio management practices in alignment with statewide business direction. The position will formulate, maintain and mature best practice based project management frameworks, processes, templates and policies required for statewide use relating to all aspects of project delivery to include Project Management, Portfolio Management, Organizational Change Management, Business Process Reengineering, varied System Development Lifecycle and other disciplines and ensure consistency and implementation in the application of the overarching frameworks and methodologies to State of CA IT Projects.

The position will lead and manage the provisioning of centralized management of IT projects so that strategic business benefits are realized through standardized methodologies, tools and techniques. The proposed CEA will ensure that these staff embedded at State departments to manage projects perform all processes of the project management discipline to deliver business benefits within their cost and scope baselines. Additionally, the proposed CEA will carry out the administrative functions relating to project managements services engagements, arrange for and facilitate interviews and vetting of potential PM staff, and prepare MOUs and service agreements as required for recovery of costs for services. The new CEA will oversee all management and tracking and administration relating to project management service delivery. Provide project and portfolio management leadership and training. Ensure the availability of the most highly skilled, experienced and well trained project management staff that can manage projects to successful completion for various state entities.

The new CEA will lead and manage efforts relating to the coordination, monitoring, and portfolio reporting of projects for departments under the authority of CDT’s Office of Statewide Project Delivery. This individual will lead efforts to solicit, compile, and report internally and externally on information relating to the Statewide Project Portfolio. He or she will ensure that CDT leadership has an accurate, current and meaningful visibility to of the status State’s IT projects in order to advise and consult with Departments on strategies and methods to successfully deliver intended business outcomes. He or she will be responsible to ensuring meaningful and accurate deliver of project management portfolio reports for active IT projects. In this role, the CEA will ensure that portfolio related reports and websites are compiled, received, analyzed, and published in an efficient, effective, and accurate manner. He or she will collaborate with staff and leadership from CDT and with State Entities, and agencies to facilitate CDT’s portfolio management functions and develop, coordinate, and plan portfolio related meetings, presentations, briefings, and reports.
10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department’s mission.

- Program is directly related to department’s primary mission and is critical to achieving the department's goals. [✔]
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

**Description:**

The mission of the CDT is to partner with state, local government and educational entities to deliver digital services, develop innovative and responsive solutions for business needs, and provide quality assurance for state government IT projects and services.

CDT is the central IT organization for the state, responsible for approval, procurement, project management and oversight of state IT projects. The Department provides leadership for the state’s IT programs and works collaboratively with other IT leaders throughout the state. This includes maintaining policies and procedures for the approval, management, oversight and continuation of IT projects. The CDT has approval, suspension, termination, and oversight authority for California State Information Technology projects; the CA-PMO is responsible for planning and delivering successful IT projects on behalf of state departments and agencies that need technology systems but lack the experience and expertise required to manage technology projects in-house.

Delivering digital services and responsive solutions for business needs through successful IT projects and procurements is imperative to the mission of the CDT, as well as the Governor’s Office and the Legislature’s expectation of reliable IT services to achieve strategic direction.
11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

Over the past year, it has become more and more imperative that the CA-PMO take more action to assist State departments in their efforts to manage their project portfolios to successful delivery. Most State departments lack the portfolio management maturity required to make the most of their IT investments through portfolio management discipline. The proposed CEA will have the responsibility to develop and mature portfolio management practices that will assist both the CDT and State departments in better managing their IT project portfolios, helping to promote better decision making, reduce risk, and optimize these IT investments. The CDT meets regularly with State departments at the Directorate and Executive level to review and oversee their portfolios to help to ensure their success. This CEA will work to mature these practices and have direct responsibility for ensuring that the CDT is positioned through portfolio management discipline and processes to better assist departments in managing their portfolios thereby protecting the States IT investments.

Development of Agile methods that are used for the development of IT systems has become increasingly the go-to method for State IT projects. The discipline is becoming widely used by State departments seeking to deliver business value in smaller more manageable increments, in a closer collaboration with business customers, and at a more rapid pace. These disciplines are still forming and though they offer a significant value, can also introduce risk to projects if not carried out properly. The CEA will address the increasing need for methodologies, knowledge and skills needed prepare and aide State departments in using these methods more successfully. The CEA will directly and indirectly (through the provision of management and oversight of staff) develop, implement, and maintain statewide policy, methodology, and standards regarding the use and adoption of agile project management and software development processes. Like other framework documents published by the CA-PMO, the agile resources will consist of diagrams, playbooks, templates, tools that will be used by state practitioners in support of IT Project Delivery. These resources will be published on the CDT website and identified in SIMM 45 as they set forth mandatory and recommended requirements for the use of agile methods in support of the delivery of IT Projects.

The overall functions with the OSPD have become increasingly complex and the burden to management responsible for delivering these services is high due to the demand for greater capabilities in project management, increasingly complex projects, and the ever changing skills that are needed to manage projects successfully. This position will help to balance the distribution of executive level management responsibilities and leadership duties across the OSPD and ensure the PMO continues to mature and is prepared to meet the high demands of the State from a project management perspective successful.
C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

As part of the 2014-15 Budget Act, the Legislature approved a Governor’s proposal to establish a centralized project management office within the CDT with the intent to address critical deficiencies in project management within the State and avoid the IT project failures of the past. The proposed CEA will be the Deputy Director of the California PMO with responsibility to deliver project management services across the State.

Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements. Project Management develops and implements plans to achieve a specific scope that is driven by the objectives of the program or portfolio it is subjected to and, ultimately, organizational strategies.

In this role, the proposed CEA will be accountable for the development and continued maturation of project management as it relates as per SAM Section 4910.

More specifically, the proposed CEA will have accountability to ensure that project management staff hired to run the State’s IT projects commensurate with the project’s complexity of the project and meet Project Manager Qualifications under SAM 4910.1 The CA-PMO hires PMs on a continuous basis, and maintains staffing who can deliver quality project management services as well and ensure that staff hired to perform these services have the skills, experience, and knowledge required to be successful. This includes their training and continuous development and helping them to remain up to date on new project management trends and system development disciplines to help ensure project success.

In addition, the proposed CEA will have accountability for the development and continued maturation of the California Project Management Framework (CA PMF) as per SAM 4910.2. Many State departments lack the standardized methodologies to manage IT projects with the lowest risk and complexity. Given this, the CDT must ensure that frameworks and methodologies based upon industry best practices are available to these entities to improve their chances for delivering successful business outcomes through their IT project investments. The proposed CEA will have accountability for making certain that CDT maintain and evolve its project management related frameworks to keep in pace with industry changes in project delivery. As a supplement to the CA-PMF, the CA-PMO will continue to develop, implement, and maintain statewide policy, methodology, and standards regarding the use and adoption of agile project management and software development processes. Like other framework documents published by the CA-PMO, the agile resources will consist of diagrams, playbooks, templates, tools that will be used by state practitioners in support of IT Project Delivery. These resources will be published on the CDT website and identified in SIMM 45 as they set forth mandatory and recommended requirements for the use of agile methods in support of the delivery of IT Projects. Like the CA-PMF, the agile resources will be an integral part of the Project Approval and Project oversight process. CDT will leverage the agile resources during the Project Approval Process to assess a department’s choice to leverage agile processes and inform CDT’s decision as to whether a project should be approved based on the project’s description of its plan and readiness to initiate and successfully manage the project. The agile resources will also be used in CDT’s provision of oversight services to identify and mitigate risk to the successful delivery of IT projects. CDT’s project delivery frameworks including the CA-PMF lifecycle are set forth in SAM, SIMM, and the CDT website and are referenced by other stakeholders including the Legislature, California State Auditor, Department of General Services, and Department of Finance as an assessment tool.
C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position’s scope and nature of decision-making authority?

The scope of the proposed CEA will be the provisioning of project management services to State entities, the development and maturation of frameworks and methodologies needed by State entities to run successful IT projects so that through technology and smart management of these investments, State entities can achieve the strategies they set to run State business successfully. In addition, the proposed CEA will have responsibility to develop and mature portfolio management functions at the CDT on behalf of the CDT and State departments managing costly IT project portfolios.

The proposed CEA will be the primary decision maker for the provisioning of direct project management services, portfolio management functions, as well as the development and maturation of project and portfolio methodologies and processes that are used by CA-PMO staff and State entities to manage State IT projects with reduced risk to the States IT investments. The proposed CEA will be the primary decision maker for considerations relating to direct management services delivery, hiring and training and development of project management staff, administrative decisions relating to staff and the workload in the CA-PMO.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

As a direct report to the Deputy Chief Project Officer, the CEA will develop, implement and maintain statewide project management policy, methodology and standards to strengthen and mature project and portfolio management practices and improve delivery of state services. The CEA will establish the complexity/risk ratings that trigger whether a project will be managed by the California PMO through the State Project Approval Lifecycle (PAL). The CEA will establish and maintain industry best practice based frameworks, processes and templates as needed for Statewide use relating to all aspects of Project Delivery including: Project Management, Organizational Change Management, Business Process Reengineering, and Systems Development Lifecycle disciplines. The CEA will also ensure consistency and implementation in the application of overarching project management framework and methodologies to State of CA IT Projects.