

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

2026-02-24

2. Department

Department of Developmental Services

3. Organizational Placement (Division/Branch/Office Name)

Population Risk, Quality Assurance, and Data Operations

4. CEA Position Title

Project Manager

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The Department of Developmental Services (Department) proposes a new CEA level B, Project Manager, Life Outcome Improvement System (LOIS), responsible for strategic planning, policy development, direction, oversight, and overall completion of the multi-phased development and implementation of the LOIS Project. LOIS is a complex multi-year and multi-million dollar initiative by the Department to replace 40-year-old legacy systems with a modern, online platform for case management and financial information. The LOIS initiative encompasses the full experience of individuals and families, from intake and assessment to coordination of care, service delivery, to billing and reporting, while promoting transparency, accessibility, and measurable outcomes. LOIS aims to improve life outcomes for individuals with intellectual and developmental disabilities (IDD) in support of the Department's mission to ensure Californians with IDD have the opportunity to make choices and lead independent, productive lives as members of their communities in the least restrictive setting possible.

6. Reports to: (Class Title/Level)

Chief Deputy Director, Population Risk, Quality Assurance, and Data Operations /2nd organizational level

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 Project Manager, LOIS, serves as the executive lead for the LOIS Project and is responsible for the strategic planning, policy development, direction, oversight, and successful completion of its multi-phased implementation. LOIS is a complex, multi-year, multi-million-dollar initiative to replace the Department's 40-year-old legacy systems with a modern, integrated online platform for case management and financial information. The system is designed to improve life outcomes for individuals with intellectual and developmental disabilities (IDD) by supporting person-centered planning and providing individuals, families, and service providers with direct access to information and tools. This position is responsible for ensuring the system successfully standardizes referral, intake, and assessment processes across California's regional centers (RCs) to improve equitable access to services. Specific responsibilities of the CEA position include, but not limited to, the following.

Strategic Leadership and Policy Development: Provide executive leadership for the development of program and operational policies, execution, and completion of the LOIS Project plan, ensuring alignment with the Master Plan for Developmental Services and state and federal regulatory requirements. Establish and oversee program and operational policies related to system development, user experience and accessibility, data governance, security and fraud prevention, reporting and analytics, and ongoing system operations and maintenance.

Project Coordination and Management: Provide executive-level oversight and coordination of the LOIS project, ensuring alignment across all project phases, governance structures, and related departmental initiatives. Resolve complex, high-impact project issues that cannot be addressed at lower levels, exercising executive judgment to remove barriers, mitigate risk, and ensure continuity of progress. Direct and guide project management functions to ensure effective execution, accountability, and integration with Department strategic priorities. Foster a high-performing project environment and take decisive action to ensure delivery of high-quality, sustainable solutions that advance the Department's strategic and operational objectives.

Community Engagement: Facilitate ongoing collaboration with individuals, their families, regional centers (RCs), and service providers to ensure the system meets community needs. Ensure information and policies for the LOIS project are communicated to the community. Develop appropriate management strategies to effectively engage the community in project decisions and execution.

Vendor and Resource Management: Oversee procurement activities, including requests for proposal process(es), select vendors, monitor, and manage high-level contracts for system development, testing, and implementation.

Statewide Process Standardization: Lead policy development to establish uniform statewide definitions processes, forms, and assessment tools, including those related to generic services, respite, and daycare fore intergration into the LOIS.

Data Integrity and Analytics: Oversee data migration from legacy systems and establish protocols for real-time reporting on service equity, demographic data, and individual progress toward life goals.

Risk Mitigation: Identify and mitigate high-level technical, financial, programmatic, and operational risks to ensure the project remains on schedule and within budget throughout the project lifecycle.

Reporting and Communication: Develop and implement reporting protocols to effectively communicate the status of the LOIS Project to stakeholders, advocates, and legislative representatives. Serve as the primary advisor to the directorate on all LOIS-related policy and operational matters. Represent the project with external partners such as the California Department of Technology (CDT), the California Health & Human Services Agency (CHHSA), other CHHSA departments, and control agencies.

B. SUMMARY OF REQUEST (continued)

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 Department administers the Lanterman Developmental Disabilities Services Act (Lanterman Act) and the federal Individuals with Disabilities Education Act (IDEA), including the Early Start Program, which provides services to infants and toddlers who have, or are at risk of having, developmental disabilities. The Department's home and community-based service delivery system is coordinated through 21 contracted, nonprofit regional centers (RCs), which collectively support more than 500,000 individuals with intellectual and developmental disabilities (IDD) in achieving their personal goals.

Program and operational activities across RCs and SOFs rely on mission-critical information technology systems that are more than 40 years old and no longer capable of supporting modern case management, fiscal tracking, claims processing, or reporting requirements. Over time, several RCs implemented alternative case management solutions, resulting in fragmented and non-standard data sources, reduced data integrity, and limited ability to aggregate or use data effectively for statewide oversight and program monitoring. In addition, existing systems do not provide functionality for individuals, families, or service providers to directly access or update information, limiting transparency and efficiency.

LOIS is the Department's approved initiative to replace and consolidate decentralized and outdated case management and fiscal systems with a single, modern, integrated solution for RC programs. LOIS is designed to meet the needs of individuals and families, service providers, RCs, and the state by strengthening statewide oversight, improving data integrity, and increasing public transparency. The system will be outcomes-based and aligned with whole-person care. LOIS will provide secure, role-based access through web-based and mobile portals, enabling efficient communication and timely access to information for individuals receiving services, their designated representatives, RC staff, service providers, and Department staff. This CEA position is responsible for the strategic planning, policy development, direction, oversight, and successful completion of the multi-phased development and implementation of the LOIS Project.

The LOIS initiative encompasses the full experience of individuals and families, from intake and assessment to coordination of care, service delivery, to billing and reporting, while promoting transparency, accessibility, and measurable outcomes. LOIS is designed to improve life outcomes for individuals with IDD in support of the Department's mission to ensure Californians with IDD have the opportunity to make choices and lead independent, productive lives as members of their communities in the least restrictive setting possible. Further, LOIS advances the following CalHHS guiding principles by promoting equity, leveraging data to drive action, strengthening person-centered service delivery, and delivering measurable outcomes.

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

The Department has initiated a multi-year effort to modernize the information technology systems used by California's 21 RCs. RCs currently rely on separate, outdated systems for case management, accounting, and federal reimbursement billing, many of which are based on 1980s-era technology. Case management systems are not standardized across RCs, with some centers implementing local workarounds to address limitations of the legacy environment. This fragmented and highly decentralized architecture has resulted in duplicative systems, inconsistent data standards, limited interoperability, and reduced data integrity, significantly constraining data sharing, program oversight, and timely reporting. The lack of real-time visibility limits the Department's ability to monitor service quality and outcomes statewide, support the full continuum of care for individuals and families, and efficiently manage nearly \$7 billion in annual federal reimbursements. Existing systems also do not allow individuals or their families to electronically access their records, limiting transparency and person-centered service delivery. In March 2025, Governor Gavin Newsom and CalHHS released the Master Plan for Developmental Services, which outlines community-driven recommendations to improve access, equity, inclusion, transparency, choice, and outcomes for individuals with IDD. LOIS directly advances these priorities by modernizing systems, standardizing processes, and enabling more effective and equitable use of data across the statewide service delivery system.

The Administration and Legislature have approved funding for a modern, integrated, data-first, cloud-based information technology solution to support comprehensive case management, financial management, service delivery operations, and statewide program oversight across all RCs, including secure access for individuals to view their own records. The Department is following the state's Project Approval Lifecycle (PAL) process and is coordinating closely with CalHHS, CDT, the Department of Health Care Services (DHCS), and the Department of Finance (DOF). Since fiscal year 2021-22, the Department has received more than \$23 million for LOIS planning, staffing, and contracts, including implementation of a statewide Consumer Electronic Records Management System. The Department has requested an additional \$14.6 million in the 2026-27 Governors Budget to support RC staffing for data analysis, migration, and governance activities necessary to advance PAL planning, prepare procurement materials, ensure traceability of system requirements, and plan for implementation by the selected systems integrator. Total multi-year project costs were estimated in the PAL Stage 2 documentation at \$135 million to \$180 million, with the Department pursuing enhanced federal funding that could provide up to a 90 percent federal match.

In September 2025, the Department received approval of the PAL Stage 1 Business Analysis. In November 2025, the Department issued a Request for Information (RFI) to gather input from IT vendors, a key milestone to inform market research and refine requirements for the next phase of the LOIS Project. A Request for Proposal (RFP) is planned for release in 2026. The Department is also preparing state and federal project approval documents for CalHHS, CDT, and the federal Centers for Medicare and Medicaid Services (CMS), which provides federal funding for Medi-Cal eligible individuals. Critical project activities are underway concurrently, including ongoing stakeholder engagement to develop system requirements and collaboration with RCs to assess data quality and prioritize data cleanup in preparation for procurement and implementation.

As the LOIS Project advances, the Department has identified a critical need for a Career Executive Assignment (CEA) to provide executive leadership for the strategic planning, policy development, direction, oversight, and successful completion of the multi-phased LOIS implementation. LOIS is an exceptionally complex statewide IT transformation that will replace and modernize core program functions including intake, eligibility determination, assessments, person-centered planning, service authorization and delivery, billing, financial management, compliance monitoring, and federal reimbursement processing. A CEA is required due to the project's scale, policy implications, and direct impact on the Department's mission and statewide service delivery system. LOIS will affect more than 500,000 individuals with IDD and over 20,000 service providers across California. Disability advocates have emphasized LOIS's potential to transform how outcomes are measured and improved, how unmet needs and crises are addressed, and how transparency and accountability are demonstrated. The CEA will provide the level of authority, decision-making, and cross-functional leadership necessary to manage the project's complexity, ensure strategic alignment, mitigate risk, and deliver results that meet regulatory requirements and stakeholder expectations. The position will lead policy development, coordinate with CalHHS, the CDT, the DHCS, DOF, RCs, and other stakeholders, and guide the project through procurement, implementation, and long-term operational success.

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.

The LOIS Project is a high-profile, multi-year modernization effort that will fundamentally transform the user experience for RC staff, individuals served and their families, service providers, and Department personnel. This multi-million-dollar initiative supports the Department's mission by improving life outcomes for individuals with IDD and providing direct access to information and tools that support person-centered planning. LOIS is designed to enhance service delivery and user experience, streamline access and intake processes, strengthen communication and collaboration across individuals, families, service coordinators, and providers, and increase operational efficiency and fiscal accuracy. The project will also improve transparency, establish standardized practices, expand data accessibility, and support continuous improvement through better data and analytics.

The CEA will serve as the primary policymaker for the LOIS Project, responsible for developing and evaluating program and operational policies and overseeing their execution to ensure alignment with the Master Plan for Developmental Services and applicable state and federal requirements. Key policy areas will include system development and innovation, user experience and accessibility, data governance, security and fraud prevention, reporting and analytics, and system operations and maintenance. The CEA will lead policy development at major project milestones, including the 2026 RFP phase, where the CEA will define policy direction for refined project requirements based on vendor input and establish evaluation criteria for scoring and selecting the systems integrator.

The CEA will serve as the primary policymaker for stakeholder engagement, developing and implementing management strategies to ensure project decisions and execution reflect the needs of the diverse community served by the system. The Lanterman Act establishes a complex network of organizations and processes for service delivery and advocacy, making policy development highly sensitive. When implementing changes, the Department must collaborate closely with individuals and families, State Council of Developmental Disabilities (SCDD), Office of Client's Rights Advocacy (OCRA) in Disability Rights California (DRC) and other advocacy groups, community service providers, Association of Regional Center Agencies (ARCA), RCs, and others impacted, often with competing or conflicting viewpoints. Specific policies will include a statewide communication plan to solicit input on desired outcomes for the LOIS including in-person townhalls across the State, webinars, and collaboration with the Lived Experience Advisory Group (LEAG). Community input is needed beyond just requirements gathering as user interactions are critical during analysis, design, build, and especially test phases to continually discover, refine, and validate user needs through each phase. Further, the communication plan will enlist project support by conveying the project's strategic, operational and tactical elements, and in promoting the project's progress and accomplishment.

The CEA will serve as the primary policymaker responsible for developing and integrating standardized intake, Individual Program Plan (IPP), assessment tools, and related processes required under Senate Bill (SB) 138 (Chapter 192, Statutes of 2023). SB 138 advances person-centered, uniform, and equitable RC service delivery by requiring standardized processes, documents, and assessment tools to be incorporated into LOIS. The statute also mandates community engagement, including individuals with IDD and families that reflect the State's demographic diversity, and requires the Department to address barriers that impact access to services consistent with its mission and goals. The CEA will lead policy development for the standardized processes and establish requirements for data collection and reporting, including defining appropriate data sources for a standardized RC intake process. Policies will specify required data elements such as the number of individuals requesting intake, intake outcomes (including whether an assessment was required), time to complete assessments, and the number of notices of action issued within the initial 15-day intake period.

The CEA will serve as the primary policymaker for the development and maintenance of the Project Management Plan (PMP), subordinate project documents, project schedule, and budget. In accordance with the California Department of Technology's (CDT) California Project Management Framework (CA-PMF), the PMP must identify all work required to complete the project, define how work will be performed, and establish how progress will be measured. The PMP includes all actions necessary to execute, monitor, control, and close the project. The CEA will also lead development of the LOIS Risk Management Plan to identify and address high-level technical, financial, programmatic, and operational risks throughout the project lifecycle. The Legislative Analyst's Office noted in its March 2025 analysis that LOIS will directly impact a vulnerable population, which increases the project's level of risk. The CEA will lead risk assessment and mitigation efforts to identify, prioritize, and address events or conditions that could affect project schedule, cost, scope, or quality, thereby increasing the likelihood of successful implementation.

C. ROLE IN POLICY INFLUENCE (continued)

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

As Project Manager, the CEA will have broad, executive decision-making authority for strategic planning, policy development, direction, oversight, and successful completion of the multi-phased LOIS Project. The CEA's decisions will ensure LOIS policies and implementation remain fully aligned with the Department's mission and goals and responsive to new or changing state and federal laws, regulations, and initiatives.

The CEA will exercise substantial decision-making authority and will collaborate closely with executive management to advise the directorate on critical policy decisions. The position will engage extensively with CalHHS, DHCS, CDT, legislative staff, SCDD, OCRA within Disability Rights California, disability advocacy organizations, ARCA, vendor and provider organizations, and other stakeholders to obtain input, discuss policy considerations, and vet decisions throughout the development and implementation of LOIS.

The CEA will engage with the community statewide to understand their needs and ensure the LOIS Project aligns with the expectations of the developmental disabilities community. This position will make decisions about managing stakeholders, setting priorities, and resolving conflicts between competing efforts. The CEA will also define the long-term vision for LOIS, including the modernization roadmap and technology strategy, ensuring alignment with Department goals. The CEA will oversee the LOIS Project budget, making high-level allocation decisions and reallocating resources as priorities shift to ensure milestones are achieved.

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

The CEA will develop, modify, and implement new policies for the LOIS Project, including policies related to technology modernization, system development and innovation, user experience and accessibility, data governance, security and fraud prevention, reporting and analytics, and system operations and maintenance. The CEA will also interpret and apply existing policies to ensure seamless integration into LOIS processes and full compliance with the Lanterman Act, the federal Individuals with Disabilities Education Act (IDEA) for the Early Start Program, and applicable state and federal requirements.

As LOIS Project Manager, this CEA will lead the development of significant new program and operational policies requiring extensive stakeholder engagement with RCs, disability and service provider advocates, individuals served and their families, and other stakeholders to ensure the system reflects community needs. A statewide communication and engagement strategy will be developed and implemented, including in-person town halls, webinars, and ongoing collaboration with the Lived Experience Advisory Group (LEAG) throughout all phases of the LOIS Project. Additional LOIS policies will be developed in coordination with the directorate and Department program and operational divisions.