BACKGROUND

In December 2014, the California Department of Technology (Department of Technology) released drafts of the Stage 1 Business Analysis and Stage 2 Alternatives Analysis as part of the Information Technology (IT) project approval process which replaces the Feasibility Study Report. As documented in the Statewide Information Management Manual (SIMM) Section 19, the Project Approval Lifecycle adopted a Stage/Gate Model to improve the quality, value and likelihood of success for IT projects undertaken by the State of California. The Stage/Gate Model divides the Project Approval Lifecycle into four stages (Stage 1 Business Analysis, Stage 2 Alternatives Analysis, Stage 3 Solution Development and Stage 4 Project Readiness and Approval) each separated by gates of approval by the Department of Technology.

Since the initial draft release, the Department of Technology has made refinements to the Stage 1 Business Analysis and Stage 2 Alternatives Analysis as a result of information learned from Project Approval Lifecycle pilot projects and input from stakeholders. The updated set of instructions, information and tools related to Stage 1 Business Analysis and Stage 2 Alternatives Analysis are effective on July 1, 2015.

The remainder of the Project Approval Lifecycle, Stage 3 Solution Development and Stage 4 Project Readiness and Approval, will be released in October 2015 and will become effective in early 2016.

PURPOSE

The purpose of this Technology Letter (TL) is to announce:

- State Administrative Manual (SAM) Chapters 4800, 4900 and 5200 have been updated to replace the Feasibility Study Report (FSR) with the Project Approval Lifecycle and Stage/Gate deliverables.
- Revised SIMM Section 05A which includes the Project Approval Lifecycle stage exit dates for those proposals and projects anticipated to need funding by a specific fiscal year.
- Revised SIMM Section 19A which includes the InfoPath template, Gate 1 Evaluation Scorecard and updated instructions for the preparation and submission of the Stage 1 Business Analysis.
- Revised SIMM Section 19B which includes the InfoPath template, Gate 2 Evaluation Scorecard and updated instructions for the preparation and submission of the Stage 2 Alternatives Analysis, which replaces the FSR effective July 1, 2015.
- Revised SIMM Section 19F which includes the template and updated instructions for the preparation and submission of Financial Analysis Worksheets, which replaces the Economic Analysis Worksheets effective July 1, 2015.
- Revised SIMM Section 19G which includes the updated Project Approval Executive Transmittal
to be used for all stages.

- Revised SIMM Section 17 (CA-PMM) to include the updated Organizational Project Management Risk Assessment.

The link to SIMM sections is as follows: [http://www.cio.ca.gov/Government/IT_Policy/SIMM.html](http://www.cio.ca.gov/Government/IT_Policy/SIMM.html).

**QUESTIONS**

Questions should be directed to your Department of Technology Information Technology Project Oversight Division (ITPOD) Manager; assignments can be found at: [http://www.cio.ca.gov/Contact_Us/staff_assignments.html](http://www.cio.ca.gov/Contact_Us/staff_assignments.html)

**SIGNATURE**

/s/

Carlos Ramos, Director

California Department of Technology