CALIFORNIA DEPARTMENT OF TECHNOLOGY **TECHNOLOGY LETTER**	NUMBER: **TL 17-07**	DATE ISSUED: **DECEMBER 2017**
SUBJECT: **Updated Project Status Report and Independent Project Oversight Report**	REFERENCES: Government Code Sections 11545 & 11546 Statewide Information Management Manual (SIMM) Sections 17, 30A, 45 State Administrative Manual (SAM) Sections 4819.2, 4819.36, 4940, 4940.1, 4940.2, 4940.3, 4941, 4944 and 4947	

BACKGROUND

Pursuant to Government Code Sections 11545 and 11546, the California Department of Technology (CDT) has the responsibility and authority to establish and enforce state Information Technology (IT) policies regarding the approval and oversight of IT projects. CDT created the IT Project Oversight Framework, SIMM Section 45, to establish statewide standards and requirements for IT project management and oversight. In April 2017, CDT updated the IT Project Oversight Framework to better align project management and oversight functions with an emphasis on risk identification and reporting.

As part of the IT Project Oversight Framework, Agencies/state entities are required to report project status information for all reportable IT projects through the Project Status Report (PSR). The PSR is designed to convey the overall status and progress of the IT project to CDT and to all other interested parties within the state and local government or the public. The updated PSR provides guidance and flexibility concerning projects that are using an iterative software development methodology (e.g. agile) and will allow project managers greater flexibility regarding form and format. A PSR must be developed monthly for projects classified by CDT as medium or high criticality and quarterly for low criticality.

Additionally, the IT Project Oversight Framework requires CDT to report deficiencies, issues, findings and recommendations identified throughout the oversight process through the Independent Project Oversight Report (IPOR). The IPOR is used to detail a project's progress against the project objectives, scope, schedule, and cost defined in the approved Project Approval Lifecycle documents. An IPOR must be developed monthly for projects classified by CDT as medium or high criticality. The reporting frequency for low criticality projects is at the discretion of CDT.

The new versions of the IPOR and PSR will help ensure that status reporting is based on the cost, schedule and scope metrics which were established at the time of project approval. As innovation continues to evolve the way IT projects are delivered, the state's project management and oversight practices will continue to be reviewed and updated regularly to ensure successful project outcome.

PURPOSE

The purpose of this Technology Letter (TL) is to announce effective February 1, 2018, all reportable IT Projects are required to use the following:

- Revised SIMM Section 45E, Project Status Report Template, to enable its use for iterative software development methodologies, align with the IPOR and provide greater flexibility regarding form and format.

- Revised SIMM Section 45F, Project Status Report Preparation Instructions, to provide guidance and examples to assist Agencies/state entities complete the PSR.

- Revised SIMM Section 45G, Independent Project Oversight Report, to allow reporting on iterative projects and reduce duplication of information for more concise reporting.

- Retired SIMM Section 45H, Independent Project Oversight Report Instructions, this section has been moved into SIMM 45G.

- Retired SIMM Section 45I, Project Oversight Review Checklist.

QUESTIONS

Questions regarding this Technology Letter should be directed to your CDT IT Project Oversight Manager; assignments can be found at: http://www.cio.ca.gov/Contact_Us/staff_assignments.asp

SIGNATURE

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Amy Tong, Director

California Department of Technology