# Project Cost Delegation Accreditation Template

Each Agency/state entity must complete this accreditation template when requesting a change to their Project Cost Delegation. The accreditation template should be completed from the perspective of the Agency/state entity that is requesting the change. Complete each section and provide supporting narrative, documentation, and details where applicable. Refer to the Project Cost Delegation Accreditation Instructions in [Statewide Information Management Manual (SIMM)](https://cdt.ca.gov/policy/simm/) 15 for additional information and guidance.

* Section I - Agency/State Entity Profile
* Section II - Agency/State Entity Portfolio Overview
* Section III - Agency/State Entity Historical Projects
* Section IV - Agency/State Entity Competency and Maturity
* Section V - Attachments

| Section I - Agency/State Entity Profile | |
| --- | --- |
| **Agency/State Entity Name** |  |
| **Agency/State Entity Org Code** |  |

| **Contact Information** | **Name** | **Phone Number** | **Email** |
| --- | --- | --- | --- |
| **Agency/State Entity Contact** |  |  |  |
| **Agency Information Officer (AIO)** |  |  |  |
| **Chief Information Officer (CIO)** |  |  |  |
| **Project Management Office (PMO) Director/Manager** |  |  |  |
| **Other** |  |  |  |

| Agency/State Entity Data | |
| --- | --- |
| **Current Project Cost Delegation** | $ |
| **Current Tier** |  |
| **Proposed Project Cost Delegation** | $ |
| **Proposed Tier** |  |
| **Total Annual Budget** | $ |
| **Annual IT Budget** | $ |
| **Total Position Count** |  |
| **IT Position Count** |  |

| **Provide Justification and Narrative for the Request** |
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|  |

| Section II - Agency/State Entity Portfolio Overview | |
| --- | --- |
| **Portfolio Value**  **(Delegated and Non-Delegated)** | $ |

|  | **High** | **Medium** | **Low** |
| --- | --- | --- | --- |
| **IT Portfolio Project Criticality Count (Delegated and Non-Delegated)** |  |  |  |

| IT Portfolio Project Count | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Delegated** | **Non-Delegated** | **PAL Stage 1** | **PAL Stage 2** | **PAL Stage 3** | **PAL Stage 4** |
|  |  |  |  |  |  |

| Active Projects |
| --- |
| Attach your current portfolio report in addition to the most recent Project Status Report (PSR) for each non-delegated project. Refer to the instructions document for additional information and guidance. |

| Section III - Agency/State Entity Historical Projects (Previous 5 years) |
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| Attach the historical project worksheet in addition to a PIER for each project. Refer to the instructions document for additional information and guidance. |

| Section IV - Agency/State Entity Competency and Maturity | | | | | |
| --- | --- | --- | --- | --- | --- |
| **From your organization’s perspective answer each question on a level from “1-5” by placing an “X” in the corresponding box.**  **Level 1 - Ad-hoc:** Agency/state entity is lacking basic or standard processes/practices with no formal documentation, and activities are executed on an inconsistent basis.  **Level 2 - Basic:** Agency’s/state entity’s processes/practices are defined and documented without any metrics, and activities are performed according to defined processes/practices but are not measured.  **Level 3 - Documented:** Agency’s/state entity’s processes/practices are documented and include metrics. Activities and practices are regularly performed in accordance with defined processes/practices and are measured.  **Level 4 - Established:** Agency’s/state entity’s organizational level processes/practices are documented, standardized, measured, and managed through established metrics, and lessons learned are captured. Activities are consistently performed in accordance with the defined processes/practices and occasionally improved based on data and lessons learned.  **Level 5 - Continuous:** Agency’s/state entity’s organizational level processes/practices are documented, standardized, measured, and managed through established metrics, and lessons learned are captured. Additionally these processes/practices are continually improved and updated based on metrics and lessons learned. Activities are consistently performed in accordance with defined processes/practices and continuously improved based on data and lessons learned. | **Level 1 - Ad-hoc** | **Level 2- Basic** | **Level 3 - Documented** | **Level 4 - Established** | **Level 5 - Continuous** |
| **Portfolio Management:** To what extent does the Agency/state entity: |  |  |  |  |  |
| 1. Practice portfolio management? |  |  |  |  |  |
| 1. Leverage established criteria for determining which projects to include in the portfolio and their prioritization? |  |  |  |  |  |
| 1. Leverage resource capacity and workload management practices? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Project Management:** To what extent does the Agency/state entity: |  |  |  |  |  |
| 1. Practice project management? |  |  |  |  |  |
| 1. Regularly designate a dedicated Project Manager to each project/effort? |  |  |  |  |  |
| 1. Perform processes to monitor and control on each project/effort? |  |  |  |  |  |
|  |  |  |  |  |  |
| **Project Management Disciplines:** To what extent does the Agency/state entity practice: |  |  |  |  |  |
| 1. Governance Management |  |  |  |  |  |
| 1. Schedule Management |  |  |  |  |  |
| 1. Cost Management |  |  |  |  |  |
| 1. Scope Management |  |  |  |  |  |
| 1. Resource Management |  |  |  |  |  |
| 1. Quality Management |  |  |  |  |  |
| 1. Risk Management |  |  |  |  |  |
| 1. Issue Management |  |  |  |  |  |
| 1. Maintenance & Operations Transition Management |  |  |  |  |  |
| 1. Change Control Management |  |  |  |  |  |
| 1. Communication Management |  |  |  |  |  |
| 1. Contract Management |  |  |  |  |  |
| 1. Requirements Management |  |  |  |  |  |
| 1. Stakeholder Management |  |  |  |  |  |
| 1. Organizational Change Management (OCM) |  |  |  |  |  |
| 1. Business Process Reengineering (BPR) |  |  |  |  |  |
|  |  |  |  |  |  |

| Section V - Attachments | | |
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| **Required Attachments** | **Date** | **Description/Comments** |
| Current Portfolio Report: Attach the current portfolio report in addition to a Project Status Report (PSR) for each project as applicable. |  |  |
| Historical Projects Worksheet: Attach a PIER for each project where a PIER has been completed. |  |  |
| Organizational Strategic Plan |  |  |
| IT Strategic Plan |  |  |
| Agency/State Entity Organization Chart |  |  |
| Information Management Organization Chart |  |  |
| Project Management Office (PMO) Charter |  |  |

| Completed plans for the following project management disciplines. The plan must be from a current or recently completed project/effort from the last year. | | |
| --- | --- | --- |
| **Project Management Disciplines** | **Date** | **Description/Comments** |
| Governance Management |  |  |
| Schedule Management |  |  |
| Cost Management |  |  |
| Risk Management |  |  |
| Issue Management |  |  |
| Change Control Management |  |  |

| **Additional Attachments** | **Date** | **Description/Comments** |
| --- | --- | --- |
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