

# **Project Delegation Request**

California Department of Technology, SIMM 19E.2 (Ver. 3.0.1, 2/3/2023)

## General Information

1. Agency or State entity Name: Choose an item.

If Agency/State entity is not in the list, enter here with the [organization code](http://dof.ca.gov/Accounting/Policies_and_Procedures/Uniform_Codes_Manual/organization_codes/documents/5orgnumb.pdf).

Click or tap here to enter text.

1. Proposal Name and Acronym: Click or tap here to enter text.
2. Department of Technology Project Number: Click or tap here to enter text.
3. Proposal Description: (Provide a brief description of your proposal in 500 characters or less.)

Click or tap here to enter text.

1. Proposed Project Execution Start Date: Click or tap to enter a date.
2. PDR Submission Date: Click or tap to enter a date.

## Contact Information

1. Contact Information

Contact Name: Click or tap here to enter text.

Contact Email: Click or tap here to enter text.

Contact Phone: Click or tap here to enter text.

Contact Role: Click or tap here to enter text.

1. Attach [Project Approval Executive Transmittal](https://cdt.ca.gov/policy/simm-19/) to your email submission.

## Justification for Delegation

1. Project
   1. Justification for Delegation

Provide a concise statement explaining the reason an exemption from reporting is being requested. This justification should elaborate on the Agency/state entity’s ability to successfully plan and execute this proposed project within the Agency/state entity’s authority.

Click or tap here to enter text.

Additional Justification documentation may be included as a submission attachment if needed. Is an additional document included? Choose Yes or No.

* 1. What is your [CDT Project Cost Delegation](https://cdt.ca.gov/project-approvals-and-oversight-contact/?emrc=63f5386c93fbe)?

$ Click or tap here to enter text.

1. Market Research

Market Research ([CDT Market Research Guidelines](https://cdt.ca.gov/wp-content/uploads/2019/08/Market-Research-Guidelines.pdf)) determines whether products or services available in the marketplace can meet the business needs identified in this proposal. Market Research can also determine whether commercial practices regarding customizing/modifying products or tailoring services are available, or even necessary, to meet the business needs and objectives of the business.

* 1. Project Management Methodology: Choose an item.
  2. Market Research Approach (to date)

Provide a concise narrative description of the approach used to perform market research.

Click or tap here to enter text.

* 1. Market Research Artifacts (to date)

Market Research Artifacts can include internet research, collaboration with other governmental entities, or other documentation.

**Attach** Market Research artifacts to the email submission.

1. Procurement
   1. What is your Department of General Services (DGS) Purchasing Authority?

Choose an item.

* 1. Is this procurement anticipated to be over or under the agency/state entity’s assigned Purchasing Authority as delegated by the Department of General Services (DGS)?

NOTE: Until this Project Delegation Request (PDR) is approved, all procurement related activities must be discussed with CDT Statewide Technology Procurement (STP), not DGS.

Choose an item.

* 1. How many procurements are anticipated (primary and ancillary)?

Click or tap here to enter text.

* 1. **Which procurement vehicle does the agency/state entity anticipate using for the primary procurement?**

Choose an item.

* 1. **Does the agency/state entity anticipate any procurement risks?**

Click or tap here to enter text.

## Implementation Approach

1. Identify the type of existing IT system enhancement or new system proposed (Select ‘Yes’ or ‘No’ for each.)

Enhance the current system: Choose Yes or No.

Develop a new custom solution: Choose Yes or No.

Purchase a Commercial off-the-shelf (COTS) system: Choose Yes or No.

Purchase or obtain a system from another government agency (Transfer): Choose Yes or No.

Subscribe to Software as a Service (SaaS): Choose Yes or No.

Other: Choose Yes or No.

Specify: Click or tap here to enter text.

1. Identify cloud services to be leveraged (Select ‘Yes’ or ‘No’ for each.)

Software as a Service (SaaS) provided by CDT Office of Technology Services (OTech): Choose Yes or No.

Software as a Service (SaaS) provided by commercial vendor: Choose Yes or No.

Platform as a Service (PaaS) provided by OTech: Choose Yes or No.

Platform as a Service (PaaS) provided by commercial vendor: Choose Yes or No.

Infrastructure as a Service (IaaS) provided by OTech: Choose Yes or No.

Infrastructure as a Service (IaaS) provided by a commercial vendor: Choose Yes or No.

No cloud services will be leveraged by this alternative: Choose Yes or No.

Provide a description of why cloud services are not being leveraged:

Click or tap here to enter text.

1. Identify who will modify the existing system or create the new system (Select ‘Yes’ or ‘No’ for each.)

Agency/state entity IT staff: Choose Yes or No.

A vendor will be contracted: Choose Yes or No.

Inter-agency agreement will be established with another governmental agency: Choose Yes or No.

Specify Agency name(s): Click or tap here to enter text.

Other: Choose Yes or No.

Specify: Click or tap here to enter text.

## Governance

1. Attach the signed Project Charter for this effort.
2. Attach the draft Governance Plan for this effort.

## Schedule

1. Estimated Project Start Date: Click or tap to enter a date.
2. Estimated Project End Date: Click or tap to enter a date.
3. Attach the high-level Project and Procurement Roadmap

## Funding

### Estimated Costs – Attach Financial Analysis Workbook (FAW)

**End of agency/state entity document.**

**Please ensure ADA compliance before submitting this document to CDT.**

**When ready, submit PDR and all attachments in an email to** [ProjectOversight@state.ca.gov](mailto:ProjectOversight@state.ca.gov).

Department of Technology Use Only

Original “New Submission” Date: Click or tap to enter a date.

Form Received Date: Click or tap to enter a date.

Form Accepted Date: Click or tap to enter a date.

Form Status: Choose an item.

Form Status Date: Click or tap to enter a date.

Form Disposition: Choose an item.

If Other, specify: Click or tap here to enter text.

Form Disposition Date: Click or tap to enter a date.