

**State of California**

**Department of Technology**

**Statewide Information Management Manual – Section 50**

**Post Implementation and Evaluation Report (PIER)**

SIMM-50 Revision 1.1, Revision Date: March 2023

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## Important Information and Instructions

### Reporting Requirements

* A Post Implementation Evaluation Report (PIER) must be finalized following the completion of an Information Technology (IT) project. The exception to this requirement is if the state agency has entered into an interagency agreement with the Office of State Audits and Evaluations as stipulated under the State Administrative Manual Section 4943. A project is not considered complete until the PIER is approved by the California Department of Technology (CDT). Approval of a PIER terminates the project reporting requirements.
* The optimum time to conduct the assessment depends upon the nature of the project. Six months to one year after implementation is typical. The assessment MUST be completed within 18 months of implementation of the information technology capability. Documentation supporting the project must be kept by the agency for a minimum of 18 months following approval of the post-implementation assessment.
* If the project was subject to the approval and oversight of CDT, one copy of the PIER must be submitted to CDT for review and approval. Additionally, a copy of the PIER must be submitted to the Office of the Legislative Analyst.
* If California Department of Technology has delegated the project approval to the state agency, but in conjunction with that delegation has required the state agency submit a copy of the PIER following completion of the project, the state agency must include a copy of the latest approved Project Approval Lifecycle (PAL) or Feasibility Study Report (FSR) or Special Project Report (SPR), whichever is applicable.
* PIERs for projects subject to approval and oversight by the state agency director (i.e., delegated projects) must be approved by the agency director or the director’s designee.
* The PIER template will be introduced to the project teams during the Project Kickoff as part of the Project Approval Lifecycle (PAL).
* The project team is encouraged to keep the PIER up-to-date with the project information as it becomes available throughout the project lifecycle instead of waiting until the end of the project to initiate the updates to PIER.

### Attainment of Objectives

* Specific objectives are established during the feasibility study for each project and are documented in the Project Approval Lifecycle (PAL) (or Feasibility Study Report (FSR) for projects initiated before PAL), and possibly revised in (a) subsequent Special Project Report(s) (SPR). These objectives, which are normally defined in terms of measurable impact on agency programs and resources, provide the baseline for measurement of the project’s success. Accordingly, the narrative portion of this section of the PIER must describe the project outcome with respect to each objective included in the FSR or last approved SPR.

### Lessons Learned & Retrospective

* The PIER must contain a narrative of any lessons learned, best practices, notable occurrences, or factors that contributed to the project’s success or problems, or other information, which could be helpful during future project efforts.
* The intended outcome of capturing Lessons Learned is to establish a statewide IT Project Knowledge database.

### General Instructions

* Please ensure that all document(s) submitted are accessible to persons with disabilities based on the requirements specified in Section 508 of the Federal Rehabilitation Act of 1973, as amended, the Government Code section 11135, and the Web Content Accessibility Guidelines (WCAG 2.0).
* The PIER form and any subsequent documents will not be accepted if they are not accessible as stated.
* This form can be used for both delegated and non-delegated projects.
* Mark “N/A” for fields that are not applicable for this project.
* Please provide constructive feedback and inputs to continually improve the PIER template and process. Use the comments fields for questions and/or suggestions you may have.
* Include all attachments separately in the email when submitting the PIER. Do not add them to this template.

## Transmittal Letter

Date: Click or tap to enter a date.

To: California Department of Technology (CDT)

From: Click or tap here to enter text.

Project Name: Click or tap here to enter text.

Project Number: *[Use format, org. code-project number]* Click or tap here to enter text.

Subject: PIER for Project Click or tap here to enter text.

**Non-Delegated Project:** Choose Yes or No.- We are submitting the attached PIER in support of our request for CDT’s approval to consider this project complete and to terminate the project reporting.

**Delegated Project:** Choose Yes or No.- We are submitting the attached PIER to the CDT to confirm that this project is complete, and that project reporting will terminate.

We certify, 1) the PIER was prepared in accordance with State Administrative Manual Sections 4947 through 4947.2; and the SIMM 50.2) all document(s) submitted are accessible to persons with disabilities based on the requirements specified in Section 508 of the federal Rehabilitation Act of 1973, as amended; Government Code section 11135; and Web Content Accessibility Guidelines (WCAG 2.0).

State Entity DirectorName: Click or tap here to enter text.



Project SponsorName: Click or tap here to enter text.



Chief Information Officer (CIO): Click or tap here to enter text.



Chief Information Security Officer (CISO): Click or tap here to enter text.



Agency Information Officer (AIO):



Budget Officer:



*CC Final Version To*: *Department of Finance (DOF), Legislative Analyst’s Office (LAO)*

## Submittal Information

Submission Date: Click or tap to enter a date.

Revision Number [*increment number for every resubmission]:* Click or tap here to enter text.

## General Project Information

State Entity Name: Click or tap here to enter text.

Organization Code: *[4-digit org. code. Refer to* [*https://www.dof.ca.gov/accounting/policies\_and\_procedures/Uniform\_Codes\_Manual/Organization\_Codes/*](https://www.dof.ca.gov/accounting/policies_and_procedures/Uniform_Codes_Manual/Organization_Codes/) *for the list of org. codes]*  Click or tap here to enter text.

Organization Acronym: Click or tap here to enter text.

Project Name: Click or tap here to enter text.

Project Number: *[Org.Code-Project Number (0000-000)]* Click or tap here to enter text.

Project Description: Click or tap here to enter text.

## Project Goals/Key Performance Indicators Assessment

[*For non-delegated projects, input information from the Approval Letters. For delegated projects, input information from Stage 1 Business Analysis document(s). Finance is interested in the story behind the delta between original baseline vs final actuals.*]

### Cost

#### Metrics

##### Cost Baseline Comparison

Initial Project Cost Estimation Methodology Used [*How was the initial one-time project cost estimated? Examples: expert opinion/feature-or-function point analysis/etc.?]*: Click or tap here to enter text.

Original One-Time Project Cost [*Original Cost Baseline. For Iterative projects,* *Cost Baseline is the sum of all approved funding over the life of the project. Total Approved Planning, Solution Development, and Implementation Cost*. *For Non-Delegated projects use PAL (Stage 4) information – do not use SPR. For Delegated projects use appropriate project cost approval artifact.]*  ($): Click or tap here to enter text.

Final Actual One-Time Cost [*One-Time Cost at the conclusion of system stabilization upon acceptance by the project director*] ($): Click or tap here to enter text.

Cost Variance [*Total Approved Solution Development and Implementation Cost – Total Actual One-Time Cost*] ($): Click or tap here to enter text.

% Cost Variance [*Final Cost minus Planned costs divided by planned costs.]:* Click or tap here to enter text.

[*Note: Update the Cost Change Assessment section below if the % Cost Difference is over 10% or $5 Million, whichever is less.*]

Comments [*Provide variance explanation. What caused the variance? What was done to address and control the variance?]*: Click or tap here to enter text.

###### Unanticipated Tasks Budget Information

[*Complete this section if project included* *budget for risks or unanticipated tasks.*]

Total Unanticipated Tasks Budget Planned ($): Click or tap here to enter text.

Total Unanticipated Tasks Budget Expended ($): Click or tap here to enter text.

Comments [*List what contributed to unanticipated task budget usage. Examples: scope change, updated estimates*]: Click or tap here to enter text.

###### Maintenance and Operations (M&O) Funding Information

[*Specify a minimum budget of one (1) year Maintenance and Operations (M&O) Costs. Include planned and actual spend and include any savings in the comments field. For projects with multiple M&O years, costs should not change in subsequent years.*]

Total Annual M&O Budget Planned ($): Click or tap here to enter text.

Actual Annual M&O Budget ($): Click or tap here to enter text.

Comments: Click or tap here to enter text.

##### Cost Change Assessment

[*Complete this section if the Project Cost Variance is over 10% or $5 Million.*]

###### Special Project Reports (SPRs)

[*List all SPRs in the SPR Information section.*]

SPR Information

SPR Number: Click or tap here to enter text.

SPR Approval Date: Click or tap to enter a date.

Revised One-Time Project Cost ($): Click or tap here to enter text.

Revised Ongoing Project Cost ($): Click or tap here to enter text.

Revised Total Project Cost ($): Click or tap here to enter text.

Total Project Cost Variance ($): [Dollars added/removed as part of the *SPR approval*] ($): Click or tap here to enter text.

Comments [*Provide variance explanation. What caused the variance? What was done to address and control the variance?]*: Click or tap here to enter text.

[*Select the + symbol on bottom right of this block to add additional SPR*]

###### Change Requests (CRs)

[*Change Requests (CRs) are the mechanism by which cost changes should be approved during the project. CRs inform the SPR.* *List CRs that updated the Cost Baseline including moving funds from one-time cost to unanticipated task budget. Include CRs approved through formal Change Control Board process (CCB) as well as those that bypassed formal CCB*]

CR Number: Click or tap here to enter text.

CR Description: Click or tap here to enter text.

Original Cost Baseline ($): Click or tap here to enter text.

Updated Cost Baseline ($): Click or tap here to enter text.

CR Justification: Click or tap here to enter text.

[*Select the + symbol on bottom right of this block to add additional CR*]

Total Cost of approved Change Requests that updated the Cost Baseline ($): Click or tap here to enter text.

Comments: Click or tap here to enter text.

###### Budget Change Proposal (BCP) Information

[*List all approved BCPs related to this project*]

Total number of BCP requests submitted related to this project: Click or tap here to enter text.

BCP Number: Click or tap here to enter text.

BCP Title: Click or tap here to enter text.

BCP High Level Summary*:* Click or tap here to enter text.

BCP Link: *[Include the link to BCP from the* [*Department of Finance*](https://esd.dof.ca.gov/dofpublic/viewBcp.html) *website or an attachment, if link is not available]* Click or tap here to enter text.

[*Select the + symbol on bottom right of this block to add additional BCP*]

#### Cost Management Retrospective

Overall, what cost management activities went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

How effective was your initial cost estimation methodology in accurately determining the actual cost of your effort? What could be improved about the methodology to increase accuracy?

Click or tap here to enter text.

How effective was your change control process in estimating the actual cost of changes needed? What could be improved to increase accuracy?

Click or tap here to enter text.

What went well to ensure that costs were captured and tracked during the project? What tools were used, if any? What could be improved?

Click or tap here to enter text.

What can your organization do differently to improve overall project cost estimation and cost management for future projects? *[Examples: Improved market research? Training? Improved administrative tools? Improved vendor management?]*

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

#### Attach: Project PIER Cost Workbook

[*Attach PIER Cost Workbook to your email submission. The template is available on CDT website under https://cdt.ca.gov/policy/simm/*

*Link: https://cdt.ca.gov/wp-content/uploads/2019/08/SIMM50C\_PIER\_Cost\_Worksheets.xlsx*]

### Schedule

#### Metrics

##### Schedule Baseline Comparison

Project Start Date (Original Plan): Click or tap to enter a date.

Project Start Date (Actual): Click or tap to enter a date.

Difference (Months): Click or tap here to enter text.

Cause(s) for Variance: Click or tap here to enter text.

Project End Date (Original Plan): Click or tap to enter a date.

Project End Date (Actual): Click or tap to enter a date.

Difference (Months): Click or tap here to enter text.

Cause(s) for Variance: Click or tap here to enter text.

Comments: Click or tap here to enter text.

#### Schedule Management Retrospective

Overall, what schedule management activities went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

How effective was your initial schedule estimation methodology in accurately determining the schedule for your effort? What could be improved about the methodology to increase accuracy?

Click or tap here to enter text.

How effective was your change control process in estimating the actual schedule impact for the changes needed? What could be improved to increase accuracy?

Click or tap here to enter text.

What went well to ensure that schedule metrics were captured and tracked during the project? What tools were used, if any? What could be improved?

Click or tap here to enter text.

What can your organization do differently to increase overall project schedule estimation and schedule management for future projects? [*Examples: Improved market research? Training? Improved administrative tools? Improved vendor management?]*

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

#### Attach: Project Schedule - Gantt-Chart

[*Attach the last approved Project Schedule showing high level milestone report along with the original schedule baseline to your email submission. Export MS-Project Gantt to either Excel or PDF.*]

### Scope

#### Metrics

##### Business Problems or Opportunities / Epics

Total Planned: Click or tap here to enter text.

Total Completed & Accepted: Click or tap here to enter text.

Cause (s) of Variance: Click or tap here to enter text.

##### Data Sources

Total Planned: Click or tap here to enter text.

Total Completed & Accepted: Click or tap here to enter text.

Cause (s) of Variance: Click or tap here to enter text.

##### Data Conversion(s)

Total Planned: Click or tap here to enter text.

Total Completed & Accepted: Click or tap here to enter text.

Cause(s) of Variance: Click or tap here to enter text.

##### Interface(s)

Total Planned: Click or tap here to enter text.

Total Completed & Accepted: Click or tap here to enter text.

Cause(s) of Variance: Click or tap here to enter text.

##### Number of Users(s)

Total Planned: Click or tap here to enter text.

Total Completed & Accepted: Click or tap here to enter text.

Cause(s) of Variance: Click or tap here to enter text.

##### Total Number of Change Requests

Total CRs Created: Click or tap here to enter text.

Total CRs Implemented and Accepted: Click or tap here to enter text.

Comments: Click or tap here to enter text.

#### Scope Management Retrospective

Overall, what scope management activities went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

How effective was your initial scope determination approach in accurately determining the scope for your effort? What percentage of total scope was identified during planning, and what percentage was unanticipated but needed? What could be improved about the approach to increase accuracy?

Click or tap here to enter text.

How effective was your change control process in estimating the actual scope change impact for the changes needed? What could be improved to increase accuracy?

Click or tap here to enter text.

What went well to ensure that requirements were captured and tracked during the project? What tools were used, if any? What could be improved?

Click or tap here to enter text.

What can your organization do differently to increase overall scope identification and scope management for future projects? *[Examples: Improved market research? Training? Improved administrative tools? Improved vendor management?]*

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

#### Attach: Project Scope - Requirements Traceability Matrix (RTM)

**[***Attach the Project Requirements Traceability Matrix (RTM) to the email submission.]*

*Note: Remove confidential information before sending this attachment. Examples: Confidential information related to Security, PHI/HIPAA Compliance, etc.*

### Approval Conditions

#### Status of approval conditions

[*Include details of any high-level business functionality (or EPICs) that were previously declared as complete but were conditionally approved by CDT in an SPR. List the approval conditions and their status with relevant description*]

Approval Condition: Click or tap here to enter text.

Status: Click or tap here to enter text.

[*Select + to add additional Approval Conditions*]

## Lessons Learned and Retrospectives

### General Project Lessons

#### Retrospective

What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

*Provide information for following categories that are applicable to this project:*

### Governance and Sponsorship

#### Retrospective

Was Governance and Sponsorship effective in timely decision making and overall project guidance? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Stakeholder and Resource Management

#### Retrospective

Was Stakeholder and Resource Management effective in ensuring appropriate engagement by stakeholders to ensure the solution would deliver the intended value? Did the project have timely access to the required skill sets and resources? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Organizational Change Management

#### Retrospective

Was the OCM planning and activities sufficient to address the changes required by users and their programs? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Contract Management and Vendor Negotiations

[*CDT STP team may have additional details.*]

#### Retrospective

Did the contracts result in appropriate shared risk between the State and the Vendor and allow for enforcement of vendor accountability? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Enterprise Architecture

#### Retrospective

Did your organization engage with Enterprise Architecture early on and how effective was this engagement? Were EA recommendations considered in solution design/implementation? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Interface Planning and Implementation

#### Retrospective

Were initial estimates regarding the number and complexity of interface development needs accurate? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Data Conversion and Migration

#### Retrospective

Were initial estimates regarding the data conversion and migration needs accurate? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Testing / Quality Management

#### Retrospective

How effective were testing and quality management processes in preventing post-release defects? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Release Management (Includes Iterative Methodologies)

#### Retrospective

How effective were release management processes in ensuring timely and successful releases leading to successful use of the released functionality by users? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Overall Quality Assurance and Quality Control

#### Retrospective

How effective were the overall quality assurance and quality control tools and processes in proactively improving the product quality and project outcomes? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

### Risks and Issues Management

#### Retrospective

How effective were the risks and issue management tools and processes in proactively identifying actions that were needed to support project risk mitigation? What went well?

Click or tap here to enter text.

What could be improved or be done differently?

Click or tap here to enter text.

What is your advice for future projects based on your lessons learned?

Click or tap here to enter text.

Are there unresolved concerns/challenges/pending questions?

Click or tap here to enter text.

## Risk and Issue Log (attachment)

[*Attach the extract of Project Risks and Issues Log – include items with high and medium impact.*]

Note: Be sure to remove confidential information before sending this attachment. Examples: Confidential information related to Security, PHI/HIPAA Compliance, etc.

## Business Program Objectives Assessment

### Business Program Traceability

Business Program Problem Title: Click or tap here to enter text.

Business Program Problem Description: Click or tap here to enter text.

Business Program Unit Impacted: Click or tap here to enter text.

Business Program Objectives: Choose Met, Unmet, or Partially Met

Explanation if Objective is Unmet/Partially Met: Click or tap here to enter text.

Benefit Achieved: Click or tap here to enter text.

Technologies Supporting the Business Benefits Achieved: Click or tap here to enter text.

[*Select + to add additional Business Programs*]

*NOTE: More details are included in the Business Objective Traceability section below.*

#### Business Driver(s) Baseline

[*Business Driver(s) planned during PAL (based on S1BA). Answer only those that apply.*]

Financial Benefits

Increased Revenue: Choose Yes or No.

Cost Savings: Choose Yes or No.

Cost Avoidance: Choose Yes or No.

Cost Recovery: Choose Yes or No.

##### Mandate

**Mandate(s):** Choose an item.

Bill Number/Code, if applicable: Click or tap here to enter text.

Add the Bill language that includes system-relevant requirements:

Click or tap here to enter text.

*TIP: Copy and paste or click the + button in the lower right corner to add Bill Numbers/Codes and relevant language as needed.*

##### Improvement

Better Services to the People of California: Choose Yes or No.

Efficiencies to Program Operations: Choose Yes or No.

Improved Equity, Diversity, and/or Inclusivity: Choose Yes or No.

Improved Health and/or Human Safety: Choose Yes or No.

Improved Information Security: Choose Yes or No.

Improved Business Continuity: Choose Yes or No.

Improved Technology Recovery: Choose Yes or No.

Technology Refresh: Choose Yes or No.

Technology End of Life: Choose Yes or No.

#### Business Benefit(s) Realized [Per approved S1BA. Answer only those that apply.]

Financial Benefits

Increased Revenue: Choose Yes or No.

Cost Savings: Choose Yes or No.

Cost Avoidance: Choose Yes or No.

Cost Recovery: Choose Yes or No.

##### Mandate

**Mandate(s):** Choose an item.

Bill Number/Code, if applicable: Click or tap here to enter text.

Comments: Click or tap here to enter text.

##### Improvement

Better Services to the People of California: Choose Yes or No.

Efficiencies to Program Operations: Choose Yes or No.

Improved Equity, Diversity, and/or Inclusivity: Choose Yes or No.

Improved Health and/or Human Safety: Choose Yes or No.

Improved Information Security: Choose Yes or No.

Improved Business Continuity: Choose Yes or No.

Improved Technology Recovery: Choose Yes or No.

Technology Refresh: Choose Yes or No.

Technologies Supporting the Business Benefits Realized: Click or tap here to enter text.

### Business Objective Traceability

[*Identify the Business Objective(s) connected to the developed Business Functionality. This information will be based on the implementation of the business functionality and subsequent measurement applying the agreed upon metrices.*]

#### Business Objectives

Business Objective ID: Click or tap here to enter text.

Business Objective Statement: Click or tap here to enter text.

Metric: Click or tap here to enter text.

Measurement Method: Click or tap here to enter text.

Frequency of Measure: Annually  Monthly  Weekly  Daily  Other Click or tap here to enter text.

Original Baseline Measurement: Click or tap here to enter text.

Planned Target Measurement: Click or tap here to enter text.

Business Objective Outcome: Click or tap here to enter text.

**Measurement(s) for Business Objective Outcome**

Actual Measure: Click or tap here to enter text.

Date of Measurement: Click or tap to enter a date.

Select + to add additional Measurement Snapshot

Select + to add additional Business Objectives

## Project Cost Delegation Accreditation (optional information)

When did your organization last submit (or is planning to submit) the Project Cost Delegation Accreditation to CDT? [[State of California Department of Technology Project Cost Delegation Accreditation Instructions](https://cdt.ca.gov/wp-content/uploads/2021/03/SIMM-15A-Project-Cost-Delegation-Accreditation-Instructions.pdf)] Click or tap here to enter text.

Comments: Click or tap here to enter text.

## CDT Review Comments Log

Date: Click or tap to enter a date.

Reviewer Name: Click or tap here to enter text.

Review Comments: Comments: Click or tap here to enter text.