

2024

Resource Guide



Executive
Leadership
Orientation



Table of Contents

Introduction	1
The Purpose and Role of the AIO and CIO	2
Key Partners	3-4
Vision 2023	5-6
State Technology Policy	7-9
State Security	10-12
Statewide Project Delivery	13-17
Statewide Budget Process.....	18-19
California Legislative Process	20-23
Statewide IT Procurement Process.....	24-26
Statewide IT Professional and Workforce Development.....	27-32
Statewide Data Center Services.....	33-34
Statewide Digital Services	35-37
Statewide Enterprise Architecture	38
Statewide Broadband and Digital Literacy	39-41
Communications & Stakeholder Relations	41-42
Acknowledgements	43

Introduction

Welcome to your new leadership role in the California State technology community!

This *Resource Guide (Guide)* has been developed to support you in a successful onboarding experience. The *Guide* is designed to aid you in navigating state processes and establishing key relationships. Throughout the *Guide*, you will find many links and graphics summarizing important government processes. The intent is to provide key resources that will allow you to find answers quickly and efficiently.

In any new position, there is always a learning curve when adjusting to the responsibilities, culture, and perhaps most importantly, the knowledge required to be successful.

To help with this important transition, executive partners from multiple state departments partnered together to determine the information and resources they deemed valuable within the technology leadership community. During various focus group sessions, AIOs and CIOs were asked what information and resources they would have found valuable when they first came into their position. The result of these sessions is a broad collection of resource materials and links captured within the *Guide*.

More importantly, all contributors have been mindful to ensure the content is focused, relevant, and useful. We encourage you to explore the *Guide* and its contents and discuss associated Department and Agency processes further internally.

Shortly, you will also receive an invitation to participate in a statewide orientation session where you will meet key executive partners and network with your peers. We hope you find this *Resource Guide* a valuable tool as you navigate your new role. Congratulations on becoming one of the newest members of the technology leadership community!

The Purpose and Role of the AIO and CIO

Agency Information Officer (AIO) Responsibilities ([SAM 4815](#))

- Overseeing the management of IT assets, projects, data systems, infrastructure, services and telecommunications through the oversight and management of the department's CIO
- Developing an Agency Enterprise Architecture to rationalize, standardize and consolidate IT infrastructure, data, and procedures for all state entities within their Agency
- Approval of Project Approval Lifecycle Stage 1 Business Analyses

Reports and Activities Requiring AIO Approval ([SIMM](#))

- Project Approval Lifecycle Stage/Gate Deliverables (SIMM 19)
- Special Project Report (SPR) (SIMM 30)
- Information Management Organization (IT Org Chart)
- IT Cost Report (SIMM 55)
- Certification of Compliance with IT Policies (SIMM 71)
- COTS/SaaS Acquisition (SIMM 22)

Chief Information Officer (CIO) Responsibilities ([SAM 4815](#))

- Directly responsible for all IT activities within the state entity, including all systems, assets, projects, purchases, and contracts, and will ensure state entity conformity with the Agency Enterprise Architecture
- Portfolio management of the state entity's technology initiatives
- Operational oversight of IT functions, IT personnel, and operations including:
 - Web application development;
 - Application and database management;
 - Security administration;
 - Telecommunications;
 - Project planning, consulting, and management; and
 - Help desk and customer service management.

Additional Resources

- [Summary of Required IT Reports and Activities](#) (SIMM 05A)
- [Assembly Bill \(AB\) 2408 and associated policy](#) (PDF version)
- [Assembly Bill \(AB\) 2408 and associated policy](#) (HTML version)

Key Partners

California Department of Technology (CDT)

The [California Department of Technology](#) (CDT) is committed to partnering with state, local government, and educational entities to deliver digital services, develop innovative and responsive solutions for business needs, and provide quality assurance for state government Information Technology (IT) projects and services.

CDT is the guardian of public data, a leader in IT services and solutions, and has broad responsibility and authority over all aspects of technology in California state government, including policy formation, inter-agency coordination, IT project oversight, information security, technology service delivery, and advocacy.

CDT runs and supports the California Broadband Council (CBC) and implements broadband Executive Order and Broadband for All Action Plan, and oversight of development and construction of state-owned Middle Mile network.

Department of Finance (DOF)

The [Department of Finance](#) (DOF) is in the [Executive Branch](#). The Director of Finance is appointed by the Governor and serves as the chief fiscal policy advisor to the Governor.

The fiscal process is a dynamic one as new legislation is enacted, new regulations are adopted, priorities change, available resources increase or decrease, and the Administration itself changes. DOF impacts the fiscal activities of other state departments due to the general authority granted to them in [Government Code Section 13070](#), which provides DOF with authority over all financial and business policies of the state.

Department of General Services (DGS)

The [Department of General Services](#) (DGS) has statutory authority for the acquisition of Information Technology (IT) goods and services not associated with non-delegated IT projects. DGS delegates IT purchasing authority to those departments demonstrating the capability to make purchases that adhere to State statutes, regulations, policies, and procedures.

Within DGS, the Procurement Division (PD) provides oversight, guidance, and direction to departments in all aspects of IT procurements and acquisition methods using delegated purchasing authority.

California Department of Human Resources (CalHR)

The [California Department of Human Resources](#) (CalHR) strives to provide exceptional human resources leadership and services with integrity, respect and accountability to state departments and all current and prospective employees.

CalHR is responsible for all issues related to employee salaries and benefits, job classifications, civil rights, training, exams, recruitment, and retention. For most

employees, many of these matters are determined through the collective bargaining process managed by CalHR.

Department of Rehabilitation (DOR)

The [California Department of Rehabilitation](#) (DOR) works in partnership with consumers and other stakeholders to provide services and advocacy resulting in employment, independent living, and equality for individuals with disabilities.

DOR administers the largest vocational rehabilitation and independent living programs in the country. Vocational rehabilitation services are designed to help job seekers with disabilities obtain competitive employment in integrated work settings. Independent living services may include peer support, skill development, systems advocacy, referrals, assistive technology services, transition services, housing assistance, and personal assistance services.

Additional Resources

- [CA Legislative Information](#)
- [State of California Web Accessibility Toolkit](#) (DOR)
- [Disability Access Services](#) (DOR)

Vision 2023

CDT is currently working with various agencies, departments and stakeholders to develop a new statewide technology plan to guide us into the future. As of September 2024, this plan is still being reviewed and approved and will be included in future versions of this document when available. The previous statewide technology plan, Vision 2023, has been completed and the accomplishments are summarized below.

Vision 2023

Vision 2023 is California's Statewide Strategic Plan to use technology to meet our society's goals, and make progress on the big, complex problems affecting us all.

Our vision of the future is inspired by thousands of passionate, dedicated public servants across all of government, our legislature, local governments, and the technology community who all provided input to this strategic plan.

The people we talked to shared their passions, dreams, and what's getting in our way. We heard their ideas about what needs to change, and how we might make that change together.

We can make this vision real by bringing every part and discipline of government to work together, using technology as a lever to listen to people, help people, and improve at what we do, every single day.

Our Guiding Principles

1. Put people first

In 2020, doing our job required a clear focus on putting people first.

In 2020, putting people first meant a multi-agency team building [covid19.ca.gov](https://www.covid19.ca.gov) to meet Californians' need for understandable, accurate and up-to-date information.

We achieved this by doing the hard work to understand what Californians and the public servants working for them needed, applying disciplines like user research, analytics, product management, continuous delivery and more.

2. Continuous, timely improvement

COVID-19 showed us how public services are ready to adapt quickly and flexibly in changing circumstances. But those improvements must be timely, too.

Across all of government, we must develop and nurture a culture and the skills needed to update and improve systems and services every day, rather than waiting for large, complete replacements of IT systems.

3. Working together beats working alone

We saw the best of public service when small multi-disciplinary teams came together from different departments and agencies to solve big challenges.

With a common goal of putting people first, diverse disciplines, state staff, civic technologists and private sector partners designed and delivered compassionate, human-centered services at speed, improving every day through fast feedback.

Our Goals and Challenges

1. Deliver easy-to-use, fast, dependable, and secure public services
2. Ensure public services are equitable and inclusive
3. Make common technology easy to access, use, share and reuse across government
4. Build digital government more quickly and more effectively
5. Build confident, empowered multi-disciplinary

Additional Resources

To learn more about Vision 2023: California's Statewide Technology Strategic Plan please visit the website below:

<https://vision2023.cdt.ca.gov/>

State Technology Policy

As the State's central organization for Information Technology, the California Department of Technology (CDT) is responsible for establishing and enforcing statewide IT policies, standards, instructions, and guidelines regarding IT operations, security, project approval, procurement, enterprise architecture, and oversight.

Legislation for IT resides within [Title 2. Government of the State of California, Chapters 5.5 – 5.8.](#)

The [State Administrative Manual](#) (SAM) is the repository for most state IT policies. SAM policies are created to comply with legislative statute, regulations, or mandatory directives.

The [Statewide Information Management Manual](#) (SIMM) contains standards, instructions, forms, worksheets, and templates that state agencies must use to comply with IT policy. The SIMM also includes IT guidelines, best practices, and FAQs. The IT guidelines, best practices, and FAQs are not formal IT policy and therefore, may not have associated SAM sections.

CDT uses Technology Letters (TL) and Procedures/Standards (PS) releases to communicate changes, additions, or clarifications to state IT policies and processes. These policy TL and PS announcements are generally simple, direct, and brief providing guidance to the statutory requirements and associated directives.

TLS and PSs are communicated through a [Subscription Notification](#) service. It is highly recommended to sign up for the email notifications. Check the "State IT related policy" box to receive upcoming notifications for IT policies.

IT Policy Resources

[State Administrative Manual \(SAM\)](#) Resources

Subject	Section
General IT	4800
IT Planning & Feasibility Study	4900
IT Equipment Maintenance Records	5000
IT Standards	5100
IT Procurement	5200 (et seq.)
Information Security	5300 (et seq.)
Disposal of IT Equipment	5900
IT Fiscal (Expenditures)	6700
Automated Accounting Systems	7260 (et. seq)

[Statewide Information Management Manual \(SIMM\)](#) Resources

Subject	Sections
Schedules & Reporting Requirements	05 - 15
Procedures, Instructions, Standards, Forms, Transmittals, and Certifications	17 - 80 5300 (et. seq)
Guidelines (optional use)	110 - 180

- [Technology Letters \(TL\)](#) – contains official communications regarding state IT, including new (or major changes to existing) IT policies, procedures, services, or standards.
- [Procedures/Standards Updates \(PS\)](#) – contains official communications regarding state IT, including minor changes to existing IT policies, procedures, services, or standards.

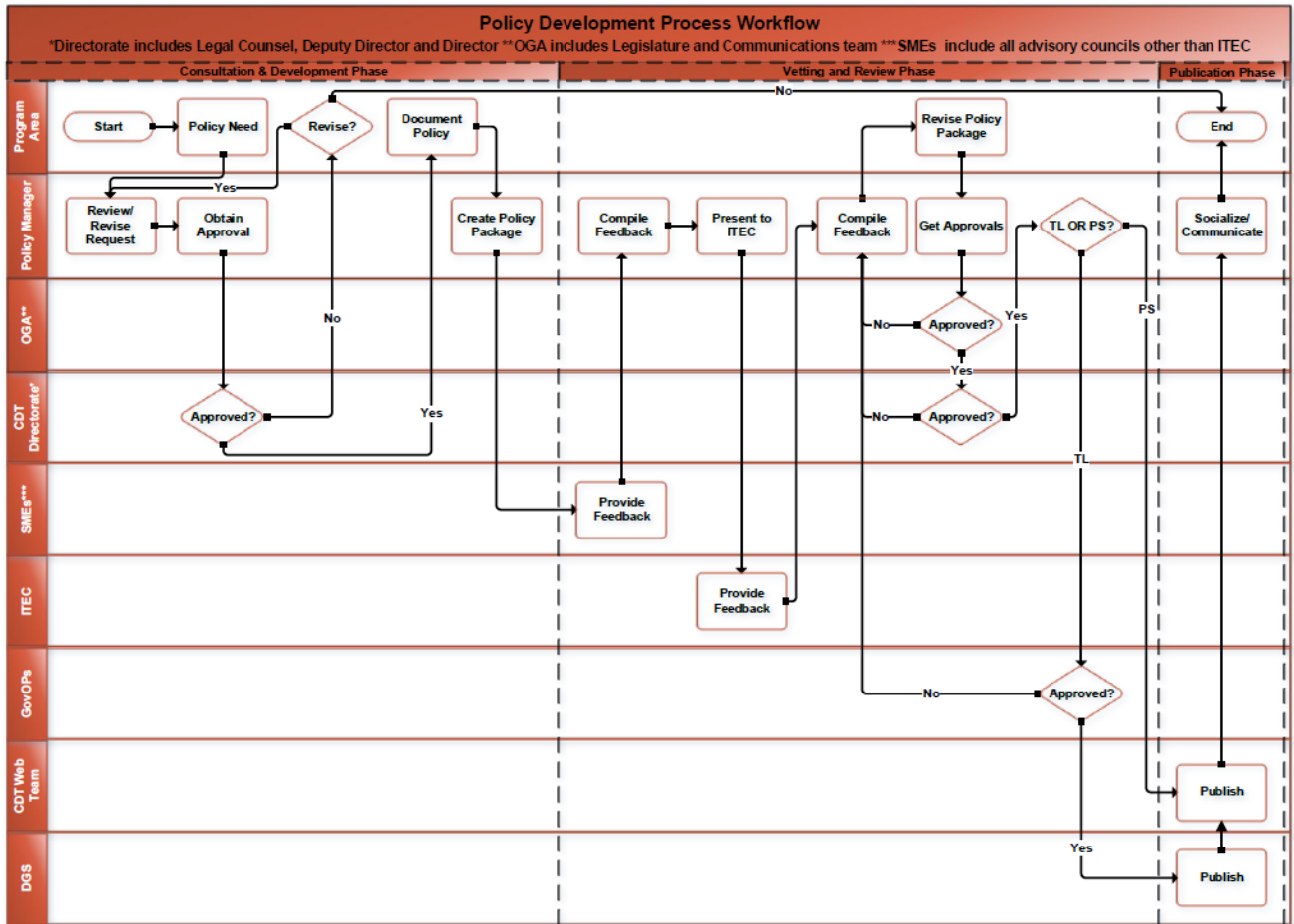
Technology Governance

State IT Policy is responsible for the following IT Governance Councils:

- **State Technology Council (STC):** Provides recommendations and decisions for IT policies, oversight, service offering recommendations, and decisions designed to align with the state IT strategic plan to deliver maximum business value for the State of California. STC is comprised of 9 AIOs, a representative from a constitutional, independent, Governor's Office and Government Operations. Within STC are Chairpersons from the following state Advisory Councils:
 - **Information Security Advisory Council (ISAC):** Guides IT cyber security and risk (*see the State Security section for more information*).
 - **Project Delivery Advisory Council (PDAC):** Guides IT projects and IT procurement (*see the Statewide Project Delivery section for more information*).
 - **Technology Operations Advisory Council (TOAC):** Guides technology operations and innovation (*see the Statewide Data Center Services section for more information*).
 - **Workforce Development Advisory Council (WDAC):** Guides IT workforce education and development (*see the Statewide IT and Professional Development section for more information*).
- **Information Technology Executive Council (ITEC):** Provides recommendations on IT security, projects, operations, innovation, workforce, policies, oversight and decisions for internal and external partners to enhance IT across the state. ITEC is comprised of STC members, and strategic advisors: DOF, DGS, CalHR, CDT Executive leadership, and Advisory Council Chairpersons.

Additional Resources

- IT-related [Budget Letters](#)
- IT-related Governor's [Executive Orders](#)
- IT-related [Management Memos](#)



State Security

The overarching goal of the [Office of Information Security](#) (OIS) is the protection of the state's vast information assets while fostering a security-minded culture throughout the workforce.

OIS has improved the state's security posture through the following initiatives:

Independent Security Assessments (ISAs)

The [ISA](#) is a technical assessment of a state entity's network security controls designed to measure cybersecurity maturity. The ISA includes testing network equipment for vulnerabilities, penetration testing, susceptibility to phishing and an analysis of network traffic for signs of compromise.

ISAs are conducted every other year either by the California Military Department or a third-party vendor approved by the Office.

Information Security Program Audits (ISPAs)

The [ISPA](#) provides an independent, objective assurance and consulting activity designed to add value and improve state entity security operations. The Audit Program performs the on-site verification activity, which includes inspection or examination, of a process or policy to ensure compliance to state requirements ([SAM 5300](#), [NIST 800-53](#)). The auditors may form an opinion of whether the audited entity is free of material misstatement, whether due to fraud or error.

At the completion of the audit, the auditor may offer objective high-level recommendations for improving security reporting and internal controls to maximize an entity's performance and efficiency.

Statewide Security Risk Governance

Security Risk Governance is responsible for the following, which encompasses the statutorily mandated functions:

- Coordinating the activities of state agency Information Security Officers for purposes of integrating statewide security initiatives and ensuring compliance with information security and privacy policies and standards
- Developing, issuing and maintaining policies, standards, and procedures directing state agencies to effectively manage security and risk, including the development and filing of technology recovery plans, and the tracking and reporting of incidents
- Assessing the effectiveness of a department's technology recovery plans, incident response, and risk remediation plans

- Promoting and enhancing state agencies' risk management and privacy programs through education, awareness, collaboration, and consultation
- Representing the state on issues that have statewide impact on information security and privacy.

Advisory Services

Advisory Services includes education and training of the state's security workforce, as well as assisting entities in preparing for the Information Security Program Audits (ISPA). The latter is accomplished through pre-and post- audit workshops, which assist entities in gathering the required audit documents, identifying gaps, subject matter experts, and other training and tools to ensure entities obtain the maximum benefit from their ISPA. Post-audit workshops assist entities in developing a prioritized roadmap to address audit findings and complete the Plan of Action and Milestones (POAM).

Advisory Services also develop and maintain standard security policies and templates to assist state entities in consistently and comprehensively documenting their information security policies.

Lastly, Advisory Services provides targeted workshops on specific topics of interest to the information security community and offers individualized consulting services to entities upon request.

Statewide Security Operations Center (SOC)

Security Monitoring and Intelligence operates a 24/7 [Security Operations Center](#) (SOC) that monitors and responds to security events generated from the California Government Enterprise Network (CGEN) and from CDT and CDT IT services. These assets face continuous threats including, but not limited to:

- Disruption of services
- Attempted breach or destruction of confidential information
- Attempted unauthorized modification of records
- Ransom threats
- Other malicious activities to undermine the State's IT infrastructure

The CDT Data Center hosts many of the State's mission critical information systems, including public safety, health services, revenue collection, budget management and other critical services on which constituents and government programs rely.

In FY 18/19, these SOC services expanded to begin to provide protective functions to State entities that opt-in to those services.

California Cybersecurity Integration Center (Cal-CSIC)

OIS continues to strengthen the State's cybersecurity defenses through an ongoing partnership and collaboration with the California Governor's Office of Emergency Services ([CalOES](#)), the California Highway Patrol ([CHP](#)), and the California Military Department ([CMD](#)) in the exchange of valuable cyber threat intelligence and interaction via the [California Cybersecurity Integration Center \(Cal-CSIC\)](#). This cross-agency collaboration increases the ongoing commitment to identify, protect, and detect threats to the State's information assets.

Cal-CSIC serves as the central organizing hub of State government's cybersecurity activities. The Cal-CSIC provides warnings of cyberattacks to government agencies and non-governmental partners, coordinates information sharing among these entities, assesses risks to critical infrastructure and information technology networks, prioritizes cyber threats, and supports public and private sector partners.

- **The Cal-CSIC Mission Support Branch (MSB)** is responsible for Cal-CSIC partner integration, IT engineering, metrics reporting & governance, knowledge management, system engineering & development, contracting, strategy development, legislative analysis, and procurement.
- **The Cal-CSIC Operations Branch (COB)** receives and reviews cyber tips and leads from a variety of sources, and coordinates with local, state, and federal partners to manage incident response in affected entities and help them recover from and prevent future cyberattacks.
- **The Cal-CSIC Cyber Threat Intelligence Branch (CTIB)** provides decision-makers with situational awareness, timely warning, and information tailored to the California threat landscape crafted by all-source intelligence analysts from military, federal, law enforcement, and cybersecurity industry backgrounds.

The above efforts provide state entities with the resources, tools and ongoing evaluation to enable them to develop and maintain effective information security programs to protect the information assets within their control and protect the state from malicious cybersecurity activity.

Information Security Advisory Council (ISAC)

ISAC is comprised of executive state leadership who provide customer-centered input on shared CDT service offerings, rates, and opportunities for cross-agency collaboration, with the focus on cybersecurity initiatives to continually mature the cyber resiliency of California. ISAC is dedicated in developing comprehensive cybersecurity policies, facilitating collaboration across sectors, and empowering all stakeholders with the knowledge and resources to combat cyber threats effectively.

Additional Resources

- [Security Training Resources](#)
- [Security Policy Overview](#)
- [Cybersecurity Toolkit](#)
- [Agency.NET Access Information](#)
- [BitSight Access Information](#)

Statewide Project Delivery

Office of Statewide Project Delivery

The statutory responsibilities of the California Department of Technology (CDT) [Office of Statewide Project Delivery](#) (OSPD) are to provide guidance and guard rails to increase the likelihood of successful Information Technology (IT) projects that meet the needs of the residents of the State of California. OSPD provides planning consulting and direct oversight to the State's multibillion dollar IT project portfolio to ensure that the State's investment in IT results in expected business outcomes.

This engagement by the OSPD help ensure department IT projects align with overall business objectives and strategies, fostering proper and executable project management processes, traceable requirements, effective governance, and due diligence in solution selection. All of this is to reduce the risk to the state and to give the project the best possible chance of success.

OSPD is comprised of two divisions: Project Approvals and Oversight (PAO) and the California Project Management Office (CA-PMO).

The Project Approval Lifecycle (PAL) - Project Planning

The CDT requires departments to do the requisite amount of upfront planning using industry aligned best practices with an emphasis on establishing a strong business case before an IT project is approved to move forward.

The [Project Approval Lifecycle](#) (PAL) is a nimble approach to meet the individual needs of departments and provides a guided approach for project planning, as well as an objective and consistent evaluation process.

The PAL planning effort is designed to improve the IT project's planning, quality, value and likelihood of success by using project planning tools, collaborative workshops, and person-to-person engagement. The PAL process is flexible and allows for both the adoption of an adaptive software development methodology (e.g., [Agile](#)) as well as a traditional predictive (or waterfall) approach.

The [PAL process](#) is divided into four stages, with gated approvals:

Stage 1 – Business Analysis (SIMM 19A)

- Evaluates completeness, the sufficiency of the business case, and whether the concept aligns with department and agency priorities.

Stage 2 – Alternatives Analysis (SIMM 19B)

- Ensures sufficiency of planning, organizational readiness, and good documentation resulting in sufficient market research, alternative analysis and justification for the selected alternative.

Stage 3 – Solution Analysis (SIMM 19C)

- Development of the procurement documents, conduct procurement while continuing with project readiness tasks.

Stage 4 – Project Readiness and Approval (SIMM 19D)

Select vendor, contract award, update final budget, project plans, and schedule. Once the project is assessed for final readiness, it could be approved for execution.

Additional Resources

- [How Do I Start a Project?](#)
- [PAL Framework](#)
- [Current PAL Proposed Projects](#)
- [Current PAO Staff Assignments](#)
- [Project Approvals and Oversight Training](#)

Independent Project Oversight (IPO) - Project Execution

The CDT conducts independent project oversight on medium and high criticality non-delegated IT projects for departments and constitutional offices (per [Government Code § 11546](#), et al).

During their oversight engagement, PAO managers are embedded with the project team, review all facets of project activities and artifacts, monitor project health, create regular [Independent Project Oversight Reports](#) (IPORs) that provide oversight observation and identify recommended course corrections, escalate project risks and issues as needed, and coach project staff in developing appropriate risk mitigation and issue resolution strategies. These activities are based on industry standards and best practices, as well as the PAO manager's expertise and experience in IT project lessons learned.

The [Information Technology Project Oversight Framework \(SIMM 45\)](#) establishes and enforces policies that describe the criteria CDT uses to assess overall project health and its risks and issues for IT projects. The PAO managers work together with Independent Verification and Validation (IV&V) service providers, whose purpose is to determine whether user requirements are met and to ensure that the product is structurally sound and built to the required specifications.

Additional Resources

- [Statewide Project Portfolio and Outcomes Dashboard](#)
- [Current list of statewide non-delegated IT projects with CDT IPO services](#)
- [Statewide Information Management Manual](#) (SIMM)
- [Reporting Due Dates](#) (SIMM 05A)

California Project Management Office

The [California Project Management Office](#) (CA-PMO) serves three primary functions: providing Project Portfolio Oversight, developing Project Management Frameworks, and offering Project Delivery Services.

Project Portfolio Oversight

The CA-PMO is the central point for collecting, maintaining, and reporting data on active non-delegated and delegated projects within each agency's portfolio and supporting all PAO operations.

Information is collected about all statewide IT projects within CDT's authority from concept ([PAL Stage 1](#)) through close out ([Post Implementation Evaluation Report – SIMM 50](#)). CA-PMO is responsible for regular and ad hoc reporting to relevant stakeholders such as Department of Finance (DOF), the Legislative Analyst's Office (LAO), and the State Auditor.

The CA-PMO is also responsible for managing the portfolio meeting process between CDT and agencies, as well as receiving monthly portfolio reports from AIOs.

Project Management Frameworks

The CA-PMO develops and maintains a collection of project resources, including comprehensive frameworks, and tools for project management practitioners based on proven best practices and lessons learned. These provide departments and organizations with the knowledge and insight to achieve their project goals.

Through practical written guidance and templates, project practitioners of all experience levels have access to a compendium of information to support the successful delivery of IT projects for the State of California.

Available frameworks include:

- [California Project Management Framework](#) (CA-PMF)
 - Provides an approach and insight on project management methods, along with practical guidance to plan and guide current projects through their lifecycle, by providing consistent and streamlined project management standards, processes, tools, and templates.
- [California Agile Framework](#) (CA-Agile)
 - Provides practical guidance for understanding, planning, and managing iterative project delivery activities within California government.
- [California Organizational Change Management Framework](#) (CA-OCM)
 - Provides project practitioners with a guide for managing change within an organization to achieve business outcomes associated with a new mandate, process, technology, or strategy.
- [California Business Process Re-Engineering Framework](#) (CA-BPR)

- Provides guidance on business process re-engineering methods and approaches to assist organizations in optimizing their business processes to leverage and maximize the capabilities of technology.
- [Software Development Lifecycle \(SDLC\) Plans and Tools](#)
 - Provides templates, instructions, and sample content that can be adjusted and scaled based on project size and complexity.

Project Delivery Services

The CA-PMO offers [direct services](#) to client departments to manage and deliver IT projects. These services include resources that can provide short-term project management and IT consulting to support effective IT project delivery.

The CA-PMO is comprised of experienced and knowledgeable professionals that are available for point-in-time project consulting to full on-site project management depending on the scope of the effort and the needs of the department.

To maintain independence of project oversight, CA-PMO only provides direct services in support of non-reportable IT projects.

Additional Resources

- [Project Management Life Cycle](#)
- [Project Delivery Resources](#)
- [Project Management Consulting](#)

Top Issues Projects Face

California has had its share of challenges on large, multi-year projects. Project issues, delays, and, even at times, failures result in constituents not receiving the services they expected, which leads to higher overall costs and increased public scrutiny.

To better understand the top risks that affect the State's IT projects, CDT analyzed past troubled projects and identified several reoccurring areas where risk and issues arise. These common risk areas for project challenges were dubbed "The Dirty Dozen" and are listed below:

- Contract management and vendor negotiations
- Data conversion and migration
- Governance and sponsorship
- Interface planning and implementation
- Organizational change management
- Quality assurance and quality control
- Release management
- Requirements definition and management
- Risks and issues
- Schedule

- Testing
- Architecture planning

Additional Resources

The Project Delivery Community of Practice (CoP) provides a way for State of California IT professionals with common interests in successful project outcomes to learn from one another and build capabilities and maturities within their respective organization through sharing of ideas, lessons learned, templates/tools, and the latest best practices.

- [Project Delivery Community of Practice](#) (CoP)

Project Delivery Advisory Council (PDAC)

PDAC serves in support of the STC in its goal to ensure that policy, oversight, service offerings, and decisions are targeted to deliver maximum business value to the State of California. This includes matters related to IT project delivery and informs the development and maturation of related CDT services, operations, policies, and methodologies.

Statewide Budget Process

The [California State Budget](#) is maintained by the Department of Finance (DOF) and is revised annually. The annual Budget Cycle is made up of three main points in time:

Governor's Proposed Budget (January)

[Article IV, Section 12](#) of the State Constitution: The Governor shall present a balanced budget to the Legislature by **January 10** of each calendar year.

Action	Timeframe
Budget Concept Developed	March
Prepare Budget Request/Justify/Agency Approval	June-August
Request Due to DOF	Early September
DOF Review and Recommendations	October - December
Final Decisions, Revisions Due	December
Governor Submits to Legislature	January 10
Budget Hearings	February - June

May Revision (May)

[Government Code 13308](#): The Director of Finance shall provide to the Legislature adjustments to the Governor's Budget **on or before: April 1, May 1, and May 14.**

Action	Timeframe
Spring Finance Letter Budget Requests due to DOF	Early February
DOF submits Spring Finance Letters to Legislature	Early April
DOF submits May Revise Finance Letters to Legislature	Mid-May
Budget Hearings	April - June

Enacted Budget (Summer)

[Article IV, Section 12\(3\)](#) of the State Constitution: The Legislature shall pass the **Budget Bill by midnight on June 15**. The Governor generally has 12 calendar days to either veto or sign.

Action	Timeframe
Conference Committee	June
Budget Enactment	July 1

Information Technology Consulting Unit (ITCU)

The [Information Technology Consulting Unit](#) (ITCU) is a unit within DOF and operates under DOF's general IT powers of supervision over all matters concerning the financial and business policies of the State, as defined in [Section 13070](#) of the Government Code. The

ITCU's primary functions include performing fiscal analysis of proposed statewide IT policies and enterprise initiatives including the analysis of proposed IT budget change proposals (BCPs) and project documents, and fiscal oversight of critical IT projects, pursuant to [Government Code 11547](#).

AIOs and CIOs are encouraged to engage with the ITCU on all IT non-delegated projects and associated funding requests early in the year prior to submission. The ITCU works very closely with CDT to ensure project approval and funding decisions can be reached within the timeframes of the annual State budget cycle. The ITCU is a critical partner to CDT in the review of all project documents ([PAL](#), [SPR](#), [PIER](#)) and CDT is critical to the review of all IT-related BCPs. This partnership has been tasked with considering and prioritizing IT proposals from a statewide perspective.

Once an IT project is funded, the ITCU shall perform fiscal oversight of the State's IT project portfolio. This includes but is not limited to: attendance at Executive Steering Committee meetings and project briefings, and review of project oversight reports and/or independent verification and validation reports. The ITCU works closely with [CDT oversight managers](#) throughout the life of the project.

Important Annual Budget Letters (BLs)

Type	Description	Release Date
Budget Preparation Guidelines	Instructions to assist in planning for upcoming budget process. Includes due date for project document submission to CDT. Also includes instructions for planning during the Spring budget process, which provides very limited circumstances for IT. (2025-26: BL 24-08)	June
Budget Policy	Governor's policy direction for upcoming budget process. Includes allowed circumstances for IT budget requests. (2025-26: BL 24-21)	July
Control Section 11.00	Instructions for notifying the Legislature of non-delegated IT project cost increases (2025-26: BL 24-18)	July
IT Project Planning Reporting	Describes requirements for IT projects that have received IT project planning funding (2025-26: BL 24-19)	July

Additional Resources

- [Budget Change Proposals](#)
- [Budget Letters](#)
- [SAM 6000 - Budgeting](#)

California Legislative Process

Legislation

The Legislative Team represents CDT with the Legislature, Legislative staff, lobbyists, and advocates in all matters regarding State Legislation. This includes identifying and monitoring introduced legislation, drafting of formal analysis documents, and supporting the development of legislation relating to the department. The team also directs the Senate confirmation process for CDT gubernatorial appointments and confirmations.

Program Responsibilities

CDT programs are subject matter experts for their respective areas and provide their expertise on legislation that impacts CDT. It is the responsibility of the program to analyze legislation that may have policy, programmatic, operational, and fiscal impact. Programs will receive requests to review legislation to determine whether it will impact the program area, identify how a bill impacts operations, and provide analysis through the formal bill analysis process. It is also the shared responsibility of programs to inform the Legislative Team if there is legislation you are aware of that the team may not be following.

Legislative Process

The California State Legislature utilizes a two-year cycle split into two one-year sessions. After introduction bills are assigned to legislative committees for review and discussion, Bills are passed from one house, the Senate or Assembly, to the other and are ultimately presented to the Governor for signature. It is important for programs to be aware of the legislative cycle to know when pieces of legislation may be moving, and when analysis may be requested. For more details, please review the links below containing more information about the California Legislature's process.

Bill Analysis

During the Legislative cycle, members of the Legislature introduce bills that may or may not affect the department. When legislation is introduced, assignments are made by the Governor's Office for agencies and departments to perform a formal analysis of the bill. These Bill Analysis Documents are developed by programs, reviewed by the legislative and legal teams, approved by the Directorate, and submitted to the Government Operations Agency for review. The analysis includes technical, policy and fiscal impact on your program. Staff preparing analysis must coordinate with the highest executive in their respective program areas to ensure information provided is approved, accurate, and consistent with program missions. When Agency finishes their review the analysis documents are submitted to the Governor's office for review. In addition to formal bill analysis, requests for fiscal impacts may be made that require a program to examine what resources would be required to implement a piece of legislation. The accuracy of Fiscal Estimates is crucial and must be coordinated with CDT's Office of Administrative Program. It is important to note that all legislative work (draft analyses, discussions, etc.) is confidential, and should be kept internal. Positions

and content are not to be discussed outside of the CDT. CDT cannot testify or publicly state positions on legislation until there is approval from the Governor's Office.

To support programs in development of Bill Analysis, the Legislative Team offers annual Analysis Training that is highly encouraged. This training provides specific details regarding processes and procedures to assist not only executives but their staff that conduct analysis work. For a visual overview of the Bill Analysis process, please see the flow chart below.

Fiscal Estimates

Proposed legislation may have a fiscal impact on the department. If it is determined that a piece of legislation will have a fiscal impact on the program, the program will be responsible for providing the Legislative team with a fiscal estimate. The program should also flag any other potentially impacted programs within the department and coordinate a fiscal for all of CDT. These fiscal estimates will ultimately provide a ceiling for funds that can be requested by the department through a budget change proposal, commonly referred to as a BCP, should the bill be signed into law. Fiscal estimates are provided to external entities, such as the Senate and Assembly Appropriations Committees, and the Department of Finance.

Bill Proposals

CDT has an annual opportunity to propose department sponsored legislation. The bill proposal process is driven by guidance given from the Governor's Office and proposals must meet certain criteria. The legislative team will send out annual notices when proposals are being accepted containing templates, instructions, and timelines. It is important that if program requires a legislative fix to address an issue that this bill proposal process is accomplished within the given timelines. Missed timelines may result in needing to wait until the next year's legislative cycle to propose a bill.

Legislative Inquiries

Legislative staff, including staff from the Legislative Analyst's Office or Little Hoover Commission, may contact you directly at any point with meeting or informational requests. If an elected official, appointed official, or their staff contact you directly, refer them to the Legislative Team immediately so the team can address any issues. This includes those that are high profile, of interest to public officials, or could generate media coverage. Any contact by staff members from the Legislature should also be routed to your Legislation Team. Additionally, if a lobbyist/advocate/vendor contacts you directly to discuss legislation, refer them to the Legislative Team. It is important that you and your team do not conduct any legislative business with legislative staff, members, or lobbyists/advocates prior to approval by the Legislative Team.

Hearings

Legislative committees may hold hearings to discuss issues related to your department's programs. This may overlap into your department's IT projects or technology program. You may be asked to testify or to provide technical assistance for or during the hearing. These hearings may take the form of an Informational Hearing, Oversight Hearing, Bill

Hearing, or Budget hearing. If you receive an invitation from the Legislature or any other entity to participate in a Legislative hearing, notify the Legislative Team immediately so they can coordinate the process.

Legislative Reports

Legislative reports are mandated by legislation or by budget language. Programs impacted by the reporting requirements included in Legislation/Budget are responsible for compliance with those requirements and for meeting the mandated deadlines. Reports should consider the political implications of the requirements and should be thoroughly proof-read to ensure they contain no errors or formatting issues when they reach the review process. The Legislative Team will route the final and approved version of the report to the appropriate individuals/parties.

Appointments

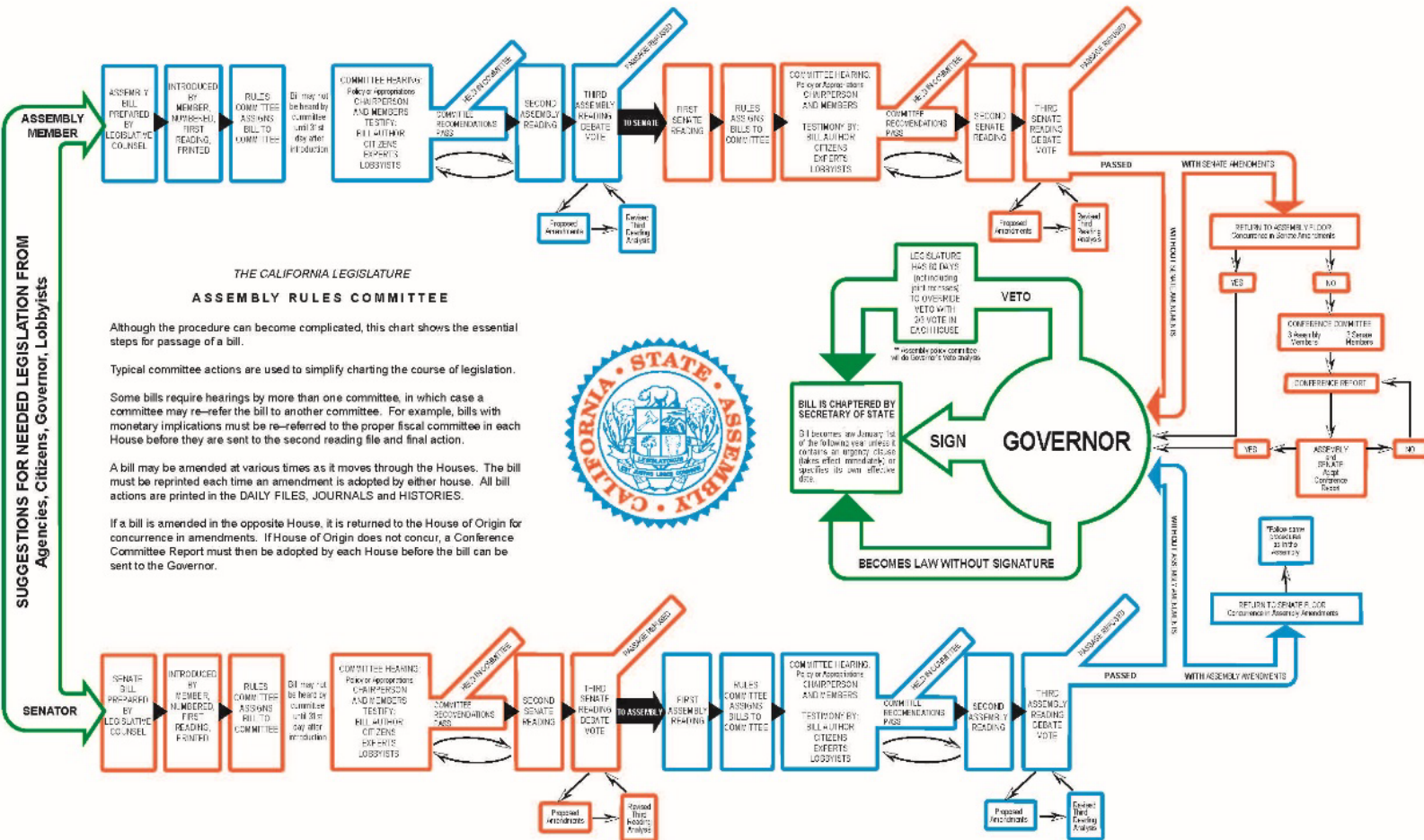
If your position requires Senate confirmation, the Senate Rules committee will contact you with a request for information, beginning your confirmation process. This will happen within one year of your appointment and is imperative that requested information is completed, approved, and provided within in a timely manner. When you receive a request for information or questionnaire from the Senate Rules Committee you must notify the Legislative team immediately. The Legislative team will assist you through the confirmation process that may consist of written questionnaires, interviews with legislative members and staff, and a formal confirmation hearing before the Senate Rules Committee.

Additional Resources

- [California Legislative Information](#) - Bill and Code Search Tool
- [California Senate Roster – Active Membership of the California State Senate](#)
- [California Senate Live Streams – Link for Online Viewing of Senate Activity](#)
- [California Assembly Roster - Active Membership of the California State Assembly](#)
- [California Assembly Live Stream – Link for Online Viewing of Assembly Activity](#)
- [Department of Finance](#) – Repository of Department of Finance Bill Analysis
- [California Legislative Process – Chief Clerk’s Office Guide on Legislative Processes](#)
- [California Agency Reports](#) – Public Repository of Legislative Reports
- [Glossary of Legislative Terms – Definitions and Explanations of Legislative Terminology](#)

THE LIFE CYCLE OF LEGISLATION

From Idea into Law



Statewide IT Procurement Process

Statewide Technology Procurement Division (STPD)

CDT's [Statewide Technology Procurement Division](#) (STPD) conducts independent project oversight for State project acquisitions of IT and Telecommunications goods and services. STPD offers the unique ability to leverage statewide experience to coach and guide customers through the many challenges that are often encountered in state procurement projects.

STPD staff partner with departments to help plan and monitor projects and to bring projects to successful deployment. Consultants focus on ensuring that the scope, schedule, and costs associated with each project are adequately defined, planned, and monitored.

CDT's authority to oversee all non-delegated IT project procurement is established under [Public Contract Code, Section 6611\(e\)](#), [Public Contract Code, Section 12100](#), and [AB 1817](#). STPD consulting staff work closely with customers to ensure project proposals and plans are well thought out and clearly indicate programmatic benefits.

Part of this process involves the consideration of feasible alternatives which address the identified needs and benefits consistent with statewide strategies, policies, and procedures.

Services include:

- Oversight for development of IT non-delegated project procurement documentation
- Ensuring procurement compliance with [SCM](#), [SAM](#), [PAL](#), [STMM](#)
- Contract negotiations
- Vendor relationship and communication management
- Post-award activity consultation
- Procurement of advisory services
- Planning & market research

Additional Resources

- [Statewide Technology Procurement \(STP\) Rates](#)
- [STP Intake Portal](#)
- [DGS Non-Competitively Bid \(NCB\) Portal](#)
- [CDT Non-Competitively Bid \(NCB\) Portal](#)
- [Post Evaluation Form for IT Services Contracts](#) (STD 971)
- For any questions, contact technologyprocurements@state.ca.gov

Statewide Telecommunications Procurement Program

CDT's responsibility and authority over any contract for the acquisition of telecommunications services and/or goods, whether by lease or purchase, is established under [Public Contract Code, Section 12120](#) & [Government Code \(GC\) Section 11541](#).

Services include:

- Procurement for the [California Network and Telecommunications](#) (CALNET) Program
- Oversight for development of non-CALNET telecommunications procurement documentation
- Ensuring procurement compliance with [SCM](#), [SAM](#), [STMM](#)
- Negotiation and management of Statewide Telecommunication contracts (including wireless/radio communication services)
- Vendor relationship and communication management
- Post-award activity consultation
- Procurement of emergency and public safety communication services

The CALNET Program partners with the Statewide Technology Procurement Division (STPD) to competitively bid the suite of CALNET contracts that are leveraged statewide by State government as well as local government entities, including many cities, counties, school districts, public libraries, federally recognized Indian tribes, and special districts across the State.

This translates into buying power for more than 2,000 customers. This significant potential financial opportunity for network and telecommunications vendors drives competition and lower prices from vendors.

Other mutual benefits are derived by promoting the growth of technologies in rural areas, providing standardized statewide pricing for services, and ensuring telecommunications systems and network services are robust, reliable, and interoperable.

Additional Resources

- [CALNET Policy and Code](#)
- [CALNET Services](#)
- [CALNET Ordering](#)
- [CALNET News](#)
- For any questions, contact CALNEThelp@state.ca.gov or (916) 657-9150

Procurement of IT Goods and Services - Department of General Services (DGS)

The Department of General Services (DGS) Procurement Division maintains a separate procurement program for the State and grants delegation of authority to approve purchase documents and contracts based on an agency's demonstrated ability to manage the procurement process. In general, DGS provides oversight when a purchase is not related to a non-delegated project.

Contact the DGS Procurement Division [Purchasing Authority Unit](#) (PAU) in order to verify current [purchase authority status](#) and [guidelines](#). The Contracts Management Unit (CMU) administers [statewide contracts](#), including contracts for IT goods and services, for use by state departments and California local governments. These contracts are developed based on the business needs of state of California departments through a competitive bidding process.

Additional Resources

- [DGS Generative Artificial Intelligence \(GenAI\) Acquisition Policy](#) (SCM 2300)
- [DGS Procurement Division Resources](#)
- [DGS Procurement Division Services](#)

Statewide IT Professional and Workforce Development

CDT's [Office of Professional Development](#) (OPD) provides a strong framework to support investment in staff across the public sector's IT community. Our strategy incorporates a hybrid model, which include a blend of live and remote training opportunities through open registration, boot camp programs, and our three distinct leadership academies aimed at meeting the state's most critical IT workforce needs.

The OPD has worked hard to establish strong partnerships with certified instructors and subject matter experts within the state to ensure a variety of courses are made available. Training is offered through courses that are developed and administered using standardized curriculum and through those that have been customized to incorporate state policy, guidelines and templates.

An additional component of our professional development training is provided through our [leadership academies](#), which are the [Information Technology Leadership Academy](#) (ITLA), [Project Management Leadership Academy](#) (PMLA), and the [Information Security Leadership Academy](#) (ISLA).

In addition to our more formal leadership academies, the OPD has also incorporated two [boot camp](#) efforts: the Emerging IT Leaders Boot Camp (EITL BC) and the Cybersecurity Boot Camp. An overview of each academy and boot camp as well as its target audience is provided below.

For those who prefer to complete training independently at their own speed, the OPD also offers IT and business professionals training at a low cost, yet robust training option via our [eLearning](#) package "Premier Advantage California eLearning" or PACe. Our PACe offerings have been updated to include not only our basic and complete subscriptions, but also two smaller, targeted packages focused on leadership/management and harassment prevention training.

Leadership Academies

Information Technology Leadership Academy (ITLA)

[ITLA](#) is a program for public sector IT professionals with a focus on developing critical leadership skills. Those with a vision for enterprise-wide thinking, strong potential for career advancement into executive or senior management positions, and experience carrying out their organization's mission and vision are ideal candidates for this program.

The academy model includes instruction combined with a collaborative student exercise, participation in the state's annual CIO Academy, and the opportunity to shadow a seasoned executive via the Walk Like a Leader experience (or Zoom Like a Leader if executed virtually).

Project Management Leadership Academy (PMLA)

[PMLA](#) is a course of study for public sector IT professionals with a focus on developing project management leadership skills. Targeting project managers with limited experience and project support personnel, the academy combines instruction with an internship component at a host department (either in person or virtually, depending on the governor's direction regarding in-person meetings).

Under the guidance of an assigned mentor, the program's internship reinforces classroom training by providing on-the-job, practical project experience and assignments to sharpen skills in the areas of relationship management, stakeholder management, team dynamics, and leadership.

Information Security Leadership Academy (ISLA)

[ISLA](#) is an academy aimed at preparing candidates for the critical roles of the Information Security Officer (ISO), Agency Information Security Officer (AIO), or an expanded role within their department's security office. While the most ideal candidates are public sector security personnel currently working in an IT management position, the academy welcomes any IT security personnel, tech-savvy IT, and aspiring ISOs passionate about security to apply.

Through coursework aimed at incorporating security best practices, trends, policies, and standards, students are prepared to complete their Certified Information Security Manager (CISM) exam by the end of the academy.

Boot Camps

Emerging IT Leaders Boot Camp (EITL BC)

The [EITL BC](#) is a 4-week program geared for entry-level supervisors or new IT managers who wish to expand or refresh their foundational leadership skills. This boot camp is well suited for those who cannot commit to one of the OPD's longer academy efforts or need a more economical alternative to training.

While the program in some ways can be viewed as a "pre-ITLA," it certainly can be completed as a standalone experience. While completion does not guarantee a spot within ITLA, it serves as excellent preparation, if this is a future goal.

Cybersecurity Boot Camp

The [Cybersecurity Boot Camp](#) is a 4-week program best suited for senior or managerial Information Security professionals who wish to expand or refresh their foundational skills in cybersecurity methodology and best practices.

Similar to the EITL BC, it too is well-suited for those who cannot commit to ISLA or do not wish to prepare for and take the CISM exam.

“Pave your Path: Navigating the Road to Training Success” Guide

For departments and agencies interested in developing their own unique training programs, OPD has created a comprehensive [Training Guide](#) to assist with developing

and implementing effective training programs. The Guide uses a comprehensive “how-to” approach that includes instructions, best practices, and valuable resources to help create impactful training courses.

IT Training Survey

Annually, OPD requests each departments' Training Officer/Coordinator to complete a survey to identify the top IT training needs for the year. The results from this survey help OPD determine the courses that will be offered through [open registration](#).

Workforce Development Advisory Council (WDAC)

WDAC is an advisory workforce-focused body comprised of management and executive leadership across all Agencies, including training, technology, and HR representatives. The purpose of WDAC is to serve as the advisory council for matters pertaining to IT workforce development initiatives for the State.

SAM 4854 – IT Training and Employee Development Policy

The IT Training and Employee Development ([State Administrative Manual \(SAM\) 4854](#)) Policy ensures the effective training and development of IT employees within the state. The policy seeks to improve the IT workforce at the state entity level by defining the roles and responsibilities of the training coordinator.

In June 2024, [Technology Letter 24-02](#) was released to announce revisions to SAM 4854 and Statewide Information Management Manual (SIMM) 71A and 71B policies. The new revision requires state entities to assess their training needs and utilize IT training offered by CDT before considering similar training from other sources. If an organization determines that the use of a CDT provided training solution is not feasible, they shall submit a Service Request for a training exemption.

Training & Education Center (TEC)

OPD's in-person courses are held at CDT's Training and Education Center (TEC) [located in Rancho Cordova](#). The [Training & Education Center](#) resides in a business park with tree covered break areas and a Cafe ready to serve a variety of meals. Our breakroom features a refrigerator, and a microwave.

Training room reservations are available upon request. All rooms have a projector and Instructor PC, and many offer additional Audio/Visual (A/V) capabilities.

Additional Resources

- [OPD Course Schedule](#)
- [Generative Artificial Intelligence \(GenAI\) Technical Training](#)
- [Registration Information and Policies](#)
- [Room Rentals and Reservations](#)
- For any questions, contact training@state.ca.gov

California Department of Human Resources (CalHR)

Workforce Development

The Workforce Development Division within CalHR is comprised of four interrelated statewide programs:

- Workforce Planning
- Succession Management
- Organizational Development
- Talent Development

The goal of these programs is to provide guidance and resources to departments so they may attract, retain, and develop a well-qualified and diverse workforce to meet their current and future business needs.

Statewide Talent and Development

This program area provides opportunities for continuous learning and development for state employees. In addition, this program provides policy oversight for the [Leadership Training and Development Requirements Policy](#) and the [Core and Leadership Competency Models](#), which serve as the foundation for all statewide training.

Talent Development partners with State departments to provide guidance regarding the development of learning solutions and training programs. In addition, the Statewide Talent Development team also oversees the operations and business efforts associated with [CalLearns](#), the Statewide Learning Management System (LMS).

- **Talent Delivery** supports Talent Development by designing, delivering, and partnering with SMEs to deploy learning solutions through the [California Leadership Academy](#) (CLA) and [California HR Academy](#) (CHRA). The CLA provides foundational mandated trainings for Supervisors, Managers, and Executives in state service. The CHRA provides training for HR professionals across state service, specifically those who serve as Selection Analysts and HR Liaisons.
- **WDD Operations (WDDO)** provides divisional support though focus on customer service, contract management, budget scoping and reporting, and program planning. WDDO also provides support through maintaining the employee interface of [CalLearns](#), which serves as a registration and training platform for statewide employees.
- **LMS Administration** supports Talent Development by providing and maintaining the technical interface of [CalLearns](#). Through improving employee accessibility on [CalLearns](#), as well as overall user experience, CalHR can provide an inclusive and intuitive platform to engage employees in their development.

CalHR Statewide Workforce Planning and Succession Management

[This program area](#) provides support and guidance to departments to help them create workforce and succession plans to align staffing with departmental strategic missions and critical needs.

Through consultation, policy administration, and providing tools, information, and resources, the team works towards ensuring every State organization with civil service employees has a current and effective workforce and succession plans so they can forecast and build towards their future needs.

In addition, the Statewide Workforce Planning team conducts workforce and succession planning training, collects and reports on the status of department efforts to create and implement workforce and succession plans, and provides useful and timely statewide workforce data.

- **Workforce Planning** is having the right number of people with the right skills in the right jobs at the right time. The [State of California Workforce Planning Model](#) provides guidance for developing a comprehensive workforce plan that aligns staffing with the strategic missions and critical needs of the organization.
- **Succession Management** supports workforce planning by developing internal resources to prepare for turnover and maintain continuity of critical business functions. The [State of California Succession Management Model](#) provides guidance to identify high risk key positions and prioritize succession management strategies.

All leaders must find ways to balance daily operations with the planning that is essential to ensuring there is a highly skilled workforce available to perform the organization's mission.

State organizations have access to support from CalHR consultants and other state organizations who share guidance, tools, resource, and best practices for building their workforce and succession plans, such as:

- [Workforce and Succession Plan Requirements Policy](#)
- [State of California Workforce Planning Model](#)
- [State of California Succession Management Model](#)
- [Workforce Planning Toolkit](#)
- [Statewide Workforce Planning Community and Events](#)

CalHR Statewide Organizational Development

CalHR's statewide organizational development services strive to align with various aspects of workforce development (e.g., workforce planning, succession management, talent development, etc.) to improve overall organizational productivity and efficiency as a strategy to mitigate organizational challenges and risks.

This includes a statewide strategy for organizational planning and performance measurement including, but not limited to,

- strategies for change readiness, process improvement, risk intelligence and mitigation
- organizational development initiatives to address statewide and departmental objectives
- ensuring that all statewide organizational development tools, and resources and services are properly evaluated for effectiveness and that they represent the best-practice material available

As one example, CalHR's [Statewide Civil Service Non-Traditional Apprenticeship Program](#) is a workforce development initiative which consists of both apprenticeships (i.e., combines on-the-job training with college courses), and pre-apprenticeships (i.e., college courses only).

Departments can leverage these career development opportunities in their pursuit of organizational development goals (e.g., diversity, equity, and inclusion, etc.). There are currently several programs with ongoing cohorts in information technology, financial services, and healthcare fields.

Additional Resources

- [State of California Leadership Competency Model](#)
- [Statewide Training Center Guidelines](#)
- [Statewide Workforce Planning and Succession Management](#)
- [Current Workforce and Succession Plan Status](#)
- [Workforce Planning Statistics](#)

Statewide Data Center Services

CDT provides a variety of infrastructure, network, software, security, and professional [services](#) to its customers to help support their public-facing and mission critical systems. CDT customers include government entities, primarily State of California departments and agencies, however many local and non-State government entities subscribe to services as well.

These services are available in both the commercial cloud and on-premises at the [Statewide Data Centers](#), and are provided by state employees, vendors, and through public/private partnerships. The full list of available services can be found in the [CDI Service Catalog](#) and can be requested through our [IT Services Portal](#). All CDT services align with statewide IT policies, which helps departments streamline the implementation of IT-related efforts.

Customer Support

- For incidents related to CDT-managed services, contact the CDT 24x7 Service Desk at (916) 464-4311 or submit an Incident Case directly via the [IT Services Portal](#).
 - Urgent incidents should be called into the Service Desk to ensure a faster response time.
- For incidents related to services provided and managed by a private vendor, contact the vendor directly.
 - Brokered service examples include Off-Premises Cloud Services, Office Productivity tools, Learning Management Systems, Project & Portfolio Management, and CALNET Telecommunication Services.
- To help ensure a positive customer experience, CDT provides a Customer Engagement Account Lead for each customer organization to serve as a single point of contact and liaison for technology services.
 - Use the [Account Lead Lookup](#) tool to identify your Account Lead.
 - If you are unable to find your organization in the list, please call (916) 431-5390 or email CIOCESAccountSpecialists@state.ca.gov for assistance.

Service Communications to Customers

CDT has multiple methods for communicating relevant service-related information to customers. Please work with your [Account Lead](#) to update and maintain organizational contact information for the following types of notifications:

- **Service Desk Bulletins**
 - Email notifications sent by CDT Service Desk to inform customers of upcoming, planned changes that may affect service availability
- **Major Incident Notifications**

- Email (and sometimes text) notifications sent by CDT Service Desk to provide customers with information on the status of significant incidents that may be impacting service availability
- **Tech Alerts (TAs)**
 - Informational bulletins issued via email by Customer Engagement Services to formally communicate new service offerings, changes in services, rates, or processes, or the discontinuance of a service offering.
 - TAs are also posted on the CDT website: <https://cdt.ca.gov/tech-alerts/>
- **Statewide Website Monitoring**
 - Email notifications sent by CDT Service Desk to inform customers if their monitored CDT- or customer-managed ca.gov website experiences an outage and/or degradation.
- **Service Request Approvals**
 - Automated email notifications sent to identified Customer Administrators when a Service Request requiring approval is submitted via CDT's [IT Services Portal](#).

Customer Communication to CDT

To ensure the availability of IT systems managed by CDT, it is important that customers promptly notify CDT of any significant application-related changes in order to mitigate the risk of a conflicting infrastructure change affecting a customer application. Customers are encouraged to send these communications through their [Account Lead](#).

CDT also leads the Technology Operations Advisory Council (TOAC). The purpose of TOAC is to serve as a customer and service-focused body comprised of executive state leadership and local government technologists who provide customer-centered input on CDT service offerings, rates, and opportunities for cross-agency collaboration.

Technology Operations Advisory Council (TOAC)

TOAC is results focused advisory council with the goal of driving shared adoption, promoting secure collaboration among agencies, and simplifying California resident's civic engagement. TOAC offers recommendations for technology, governance, and policy improvements.

Additional Resources

- [Preventative Maintenance and Patching Schedules](#)
- [Current Hardware and Software Standards](#)
- [CDT Resources and Support](#)
- [CDT Master Rates Table](#)

Statewide Digital Services

CDT's Office of Digital Services (ODS) plays a critical role in enhancing digital government and building a California that works for all Californians by prioritizing the key focus areas of the [California State Digital Strategy](#):

- Committing to Digital Services
- Sustaining an Innovation Culture
- Putting Californians first
- Developing meaningful partnerships across the State

ODS primarily serves in a "civic consultancy" role, with the aim of solving business problems by using technology rather than existing solely for the sake of doing IT. Expertise among ODS staff is varied, including front-end and server-side developers, User Interface (UI) and User Experience (UX) skills, [Geographic Information System](#) (GIS) specialists, data engineering/analytics, and [DevSecOps](#) engineering.

ODS provides foundational platforms and technology (including [GIS/Open Data](#), Web Portals, Software Engineering, and [Open-Source code](#) curation) for organizations to utilize in their development of innovative digital services, while also hosting various [communities of practice](#) to foster emerging technologies and help our partners understand critical issues impacting the State.

Current ODS Programs

Web Services

The ODS Web Services team is responsible for the design, development, and operation of the State web portal (<https://www.ca.gov>), many individual State departmental websites, and other web-based applications.

This role specifically includes:

- Responsibility for various Statewide web policies
- Managing the ca.gov domain (including the [Domain Name Request System](#)) and [State Web Template](#)
- Operating CDT's [CAWeb Publishing](#) service
- Promoting and supporting Statewide [web accessibility standards](#)
- Maintaining a consistent and effective user experience as well as content curation and delivery
- Ensuring high website stability and performance
- Facilitating greater statewide utilization of data and [website analytics](#)
- Increasing statewide collaboration

Data & Geospatial Services

The ODS Data & Geospatial Services team is responsible for ensuring the State unlocks the full value and potential of its geospatial and data assets.

This role specifically includes:

- Development of statewide data science standards
- Increasing statewide access to and sharing of information, leading to reduced data duplication and costs
- Performance and application of complex analysis, visualization, and data science
- Design and development of data warehouse systems and pipelines, including Extract, Transform, and Load (ETL) tools.

Geographic Information Systems (GIS)

The ODS [GIS](#) team is responsible for providing organizations and individuals with the ability to analyze, visualize, manage, disseminate and interpret geographic data, and the complex geographic relationship between them.

This role specifically includes:

- Development of statewide GIS standards
- Hosting of GIS web-based applications on CDT's infrastructure
- Maintaining, securing, patching, and managing Map Services infrastructure
- Operation of geocoding services
- Providing GIS consulting to organizations in need of GIS support/guidance
- Data acquisition and distribution
- Hosting the [GIS Community of Practice](#) for the statewide GIS community

Technology Innovation Services

The ODS [Technology Innovation Services](#) team is responsible for defining the next generation of trusted enterprise platforms and solutions, as well as staying up-to-date on emerging technologies across all areas of ODS' technology stack.

This role specifically includes:

- Trail-blazing new engineering solutions for the Cloud
- Fostering [DevSecOps](#) practices
- Product planning and management throughout the product lifecycle
- Coordination of new features/ functionalities
- Optimizing product strategy and roadmaps
- Utilizing [Agile](#) methodologies to guide enterprise technology projects through iterative sprints.

Digital Identity (Digital ID)

The ODS [Digital ID](#) team leads the development, implementation, administration, and management of the [California Digital ID Framework](#) — a collection of data, technology infrastructure, digital services, and governance that allows for digital identity and program eligibility verification.

As per the authority of the State CIO and State CTIO, CDT is building both the technology supporting this framework as well as policy, guidance, and governance to empower other State departments to use it to enhance their own digital service offerings.

The Framework is built around statewide technology and digital strategies and founded on four key principles:

- World-class security
- Privacy-by-Design
- Access, and Equity
- Openness, and Transparency

Additional Resources

- [Current CAWeb Publishing Customers](#)
- [OCR Bot Accessibility Assistance Tool](#)
- [Web Accessibility Toolkit](#) (offered by DOR)
- [CA Open Data Portal](#)
- [Current CDT Technology Innovation Initiatives](#)
- [User Experience \(UX\) Consulting Services](#)
- [Digital Web Services Network](#) (DWSN)

Statewide Enterprise Architecture

CDT's [Office of Enterprise Architecture](#) (OEA) identifies the business processes that execute or support an organization's mission and defines ways information technology (IT) assets enable those processes.

The purpose of EA is to optimize and transform strategy, processes, information, application systems, and technologies into an efficient and integrated environment supportive of the execution of business strategy. To help execute business strategy and realize strategic goals, EA lays out a desired target view of an enterprise's environment, then develops a plan ("roadmap") to progressively implement the desired target.

Enterprise Architecture Community (EAC)

To facilitate statewide collaboration and information sharing, OEA hosts a monthly [Enterprise Architecture Community](#) (EAC) meeting where EA-relevant topics are addressed with opportunities for group discussion.

To register with the EAC, please reach out to siuprojectreview@state.ca.gov.

California Enterprise Architecture Framework

The [California Enterprise Architecture Framework](#) (CEAF) Program is designed to provide a structured system to document the California's Enterprise Architecture so business and IT stakeholders can take action or be informed about the enterprise.

The framework helps improve architectural presence and department/agencies value, business capabilities, interoperability, and information sharing. The framework also promotes cross-program and cross-agency initiatives for shared development of common business processes and digital services, as well as reusable and application platforms.

Additional Resources

- [Enterprise Architecture \(EA\) FAQs](#)

Broadband and Digital Literacy

CDT's [Office of Broadband and Digital Literacy](#) (OBDL) manages the statewide ecosystem of individuals and organizations dedicated to closing the digital divide.

OBDL mission is to successfully lead the coordination and implementation of the state's Broadband for All program and initiatives.

OBDL's goals are aligned with the Broadband for All goals outlined in the [Broadband for All Action Plan and State Digital Equity Plan](#):

Goal 1: All Californians have high-performance broadband available at home, schools, libraries, and businesses.

Goal 2: All Californians have access to affordable broadband and necessary devices.

Goal 3: All Californians can access training and support to enable digital inclusion.

OBDL is responsible for:

- Staffing the California Broadband Council, which is chaired by CDT
- Overseeing implementation of [Executive Order N-73-20](#) and the Broadband for All Action Plan
- Leading the development of the Middle-Mile Broadband Initiative
- Overseeing the implementation of the State Digital Equity Plan
- Administering the State Digital Equity Capacity Grant and Subgrant Programs

Partners and stakeholders for this effort consist of individuals and organizations within the statewide ecosystem dedicated to closing the digital divide, including various Federal, State, and non-profit organizations.

California Broadband Council

The California Broadband Council was established by SB 1462 (Chapter 338, Statutes of 2010) to promote broadband deployment in unserved and underserved areas of the state as defined by the Public Utilities Commission, and broadband adoption throughout the state.

Executive Order N-20-73 and Broadband for All Action Plan

In August 2020, Governor Newsom signed [Executive Order N-73-20](#) to improve digital connectivity across the state. The order directed the Broadband Council to develop a statewide Broadband Action Plan and promote digital equity throughout California.

The Broadband for All Action Plan was developed in just four months during the COVID pandemic set forth a framework for closing the digital divide and foster digital equity throughout the state. The Action Plan assigned 24 specific action items to CDT, the California Public Utilities Commission, and other state agencies that include bringing

federal funding to the state to support broadband infrastructure deployment, enhancing permitting processes, promoting low-cost internet offers and subsidies, establishing a statewide network of digital inclusion stakeholders, and establishing a Broadband for All portal.

Middle-Mile Broadband Initiative (MMBI)

Governor Gavin Newsom signed [historic broadband legislation](#) in July 2021 to bridge the digital divide and provide reliable and affordable internet access to all Californians. [SB 156 \(Chapter 112, Statutes of 2021\)](#) expands the State's broadband fiber infrastructure and increases internet connectivity for all California communities.

To achieve these goals, the legislation called for the creation of a California broadband advisory committee. The [Middle-Mile Advisory Committee](#) monitors the development and construction of the middle-mile. Internet service providers and other eligible entities can connect and deliver service through the new [middle-mile network](#).

Through subsequent Budget Act appropriations and legislation, CDT's MMBI program has been appropriated \$3.87B to develop an approximately 8,000-mile MMBI network that will reach the majority of the unserved and underserved communities statewide as identified by the CPUC. As of September 2024, CDT was under construction on more than 1,800 miles of the network. Given the almost \$2.4B in federal funding that is being used, CDT must complete the MMBI network by December 2026.

Once constructed and operational, the MMBI network will provide an affordable, statewide, open access middle mile broadband highway that will serve as a backbone for communities in every county to connect to and use in accessing the existing internet grid. The presence of this backbone will be vital in many communities being able to submit grant proposals for last mile funding by providing a middle mile link through which to connect. When combined with the last mile grant funds being provided to communities, the MMBI network will serve as an essential component of the State's goal of supporting Broadband for All.

State Digital Equity Plan and State Digital Equity Capacity Grant

CDT and OBDL led the development of the State Digital Equity Plan (SDEP) with input from over 50,000 California stakeholders and residents. Funded with a federal planning grant, the SDEP identified digital equity barriers for cover populations and includes strategies and key activities to overcome those barriers. When couple with the state's Broadband for All investments, the SDEP seeks to empower policy outcomes in education, healthcare access, digital inclusion, access to essential services and government benefits programs, and tribal collaboration. CDT and OBDL will administer a \$70.2 million State Digital Equity Capacity grant, and subgrant program, which will fund statewide and local organization to conduct programs to implement the SDEP.

Additional Links

- [Broadband for All](#)
- [Last-Mile and BEAD Programs](#)
- [State Digital Equity Plan](#)

Communications and Stakeholder Relations

The CDT Office of Communications and Stakeholder Relations is responsible for ensuring that CDT has one voice, a cohesive and comprehensive look and feel for events, marketing and other communications materials. Further the Stakeholder Relations team engages in activities that directly connect our staff with leadership of key stakeholder groups to ensure the development and maintenance of strong partnerships. By hosting regular meetings, they serve to establish a clear line of communication with our stakeholders, labor groups, vendors, and more. They also partner in coordinating internal and external events.

Stakeholder Relations Team

This *Stakeholder Relations* Team provides guidance and solutions for stakeholder management, events, and engagement. This team assists in resolving conflicts with CDT's public and private clients in addition to advising divisions on how to develop more effective and measurable meetings and engagements.

Communications Team

The Communications Team develops news and information on CDT's State government technology initiatives, projects, programs, and oversight authority.

The CDT Communications team collaborates with IT teams from around the State to create the Statewide IT [Annual Report](#), beginning in August of each year. The report released every January, showcases statewide IT successes for the prior calendar year.

The CDT Communications team tells the State's IT and CDT stories in easy-to-understand plain language. The Communications Team invites content ideas from within CDT, as well as other departments from.

As the primary vehicle for CDT public communication efforts, the Communications team is the resource for all media inquiries. If you receive a media inquiry, do not respond and immediately forward to newsroom@state.ca.gov. The Communications Team manages [speaking requests](#) for the Directorate. All executives must consider first right of refusal for the Directorate. All executives are expected to manage their own and their teams' speaker requests and escalate to the Chief Deputy as appropriate. The Communications Team does not prepare speaking remarks or presentations for staff.

To connect with CDT's Office of Communications and Stakeholder Relations, please email newsroom@state.ca.gov (Communications) or stakeholderrelations@state.ca.gov (Stakeholder Relations).

Additional Links

- [CDT Newsroom](#)
- [CDT Event Calendar](#)
- [CDT Contact Information](#)
- [Public Records Request](#)
- [X](#)
- [YouTube](#)
- [LinkedIn](#)

Acknowledgements

We would like to acknowledge the following individuals and thank them for their thoughtful contributions to the *Executive Leadership Orientation Resource Guide*:

Liana Bailey-Crimmins, Department of Technology

Jared Johnson, Department of Technology

Jonathan Porat, Department of Technology

Janelle Dickey, Department of Technology

Vitaliy Panych, Department of Technology

Andrew Werfin, Department of Technology

Timothy Issertell, Department of Technology

Edmond Cheung, Department of Technology

Crystal Holcomb, Department of Technology

Chaeny Emanavin, Department of Technology

Blaine Wasylkiw, Department of Technology

Scott Adams, Department of Technology

Mark Monroe, Department of Technology

Miles Burnett, Department of Technology

Monica Hernandez, Department of Technology

Brenda Bridges-Cruz, Department of Technology

Pam Haase, Department of Technology

Sarah Gessler, Department of Human Resources

Erica Gonzales, Department of Finance

Rosanna Nguyen, Department of Finance

Angela Shell, Department of General Services

Jacob Johnson, Department of Rehabilitation