



California
DEPARTMENT OF TECHNOLOGY

Consulting and Planning Division



Can't sleep because you're worried about whether risks are being managed appropriately? Find yourself frozen in place wondering whether there is sufficient testing being done on your project? Wondering whether the staff who have to use the system will reject it?

Our consultants have expertise in twelve areas where California projects seem to run into problems most frequently. We are here to help you sleep better at night!

We offer free, confidential initial consultation to assess how we may best help you. Our costs are competitive, and our experts bring more than 130 years' cumulative experience to your project. Our business is to help your project succeed. We have no minimum number of hours you must pay for, and will stay only long enough to assist you and your staff to get your project concerns addressed and perform knowledge transfer with your team.

Our state consultants have a view into California's enterprise wide issues, as well as industry best practices, and will provide hands-on assistance, education, and mentorship to project teams.

While proactive problem avoidance is the goal, our consultants are also tasked to assist ongoing projects to identify and implement adequate or best-option solutions to issues as they arise.

Test Management

Early detection and removal of defects in the development lifecycle is critical to the success of an IT project and can be accomplished through well-planned testing strategies. **Janet Fong** will assist you with:



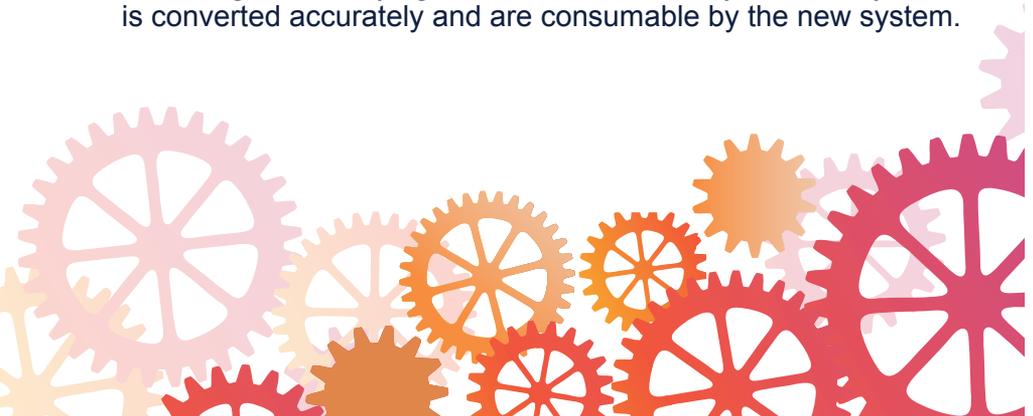
- Developing a comprehensive Test Management Plan that identifies the test scope and testing phases.
- Establishing a systematic approach for developing, managing, and implementing test activities across the development lifecycle.
- Business preparation for testing such as user acceptance testing and system testing.
- Developing test cases and test scripts.

Data Management

Since data is a critical business asset, it is the lifeblood of every organization. Establishing and maintaining data integrity and quality throughout the lifespan of the project is essential. **Shawn Nguyen** will assist you with:



- Developing a Data Conversion/Migration Plan.
- Implementing an effective Data Cleansing Strategy which encompasses the process of examining legacy data and detecting and correcting corrupt or inaccurate data. To ensure legacy data is ready for conversion, it is best when data cleansing is completed prior to the contract award of your system integration vendor.
- Establishing a practical and effective methodology for converting and migrating data from legacy systems to the new system, and validating and certifying that all data needed by the new system is converted accurately and are consumable by the new system.



Governance

Effective Governance (decision-making structure) is an essential foundation for project success. Establishing and sustaining effective governance throughout the project lifecycle will result in effective and timely decision making by focusing on structure, people, and information through the application of core governance principles. **Andy Wertin** will assist you with:



- Developing a Governance Management Plan.
- Governance planning, design, and implementation from project initiation through implementation.
- Assessing governance effectiveness and efficiency.
- Understanding the relationship between governance, project success, and managing project risks.
- Coaching Project Sponsors to effectively carry out their responsibilities.

Risk and Issue Management

Risk and issue management practices involving deliberate steps in risk planning, identification, analysis, and response must be implemented during all phases of the system development life-cycle. **Andy Wertin** will assist you with:

- Developing a Risk and Issue Management Plan.
- Planning, establishing, monitoring, measuring, and sustaining effective risk management practices throughout the project lifecycle.
- Assessing and reviewing risk management process, tools, and documentation.
- Providing risk management tools, templates, and best practices.



Organizational Change Management

Best practice indicates that successful management of organizational change depends on a structured approach to planning and managing the effects of an IT project on the people of the organization.

Andy Wertin will assist you with:

- Developing an Organizational Change Management Plan.
- Assessing the strategy and scope of the organizational change effort.
- Identifying and assessing early planning, strategy, communication, and adoption, and measuring success.

Requirements Management

To ensure that projects better define, manage, and control requirements through the entire acquisition and development life cycle, **Rob Peterson** will assist you with:



- Developing a Requirements Management Plan before system integration contract award.
- Developing requirements prior to the issuance of your procurement documents.
- Reviewing contract requirements elaboration during contract negotiations.
- Providing assistance in managing and tracking requirements throughout the acquisition and development life cycle to help ensure that all requirements have been identified, delivered, tested, and accepted and that all changes to requirements, which always occur, have been accounted for and are traceable.
- Defining and configuring the tools used to trace requirements.
- Reviewing and providing recommendations on the actual execution of the requirements management process.



Contract Management

Whether developing your procurement document that leads to the contract or ensuring the successful execution of the contract, understanding contract development and vendor management are key elements to ensuring a successful project.

Tiffany Angulo will assist with:



- Developing a Contract Management Plan that includes administering the contract.
- Developing procurement documents with appropriate terms and conditions and rights and remedies for the State.
- Developing Corrective Action Plans and Cure notices to remediate deficiencies.
- Ensuring the management of the contract tracks State and System Integrator responsibilities (as well as payable deliverables) so that all contractual obligations are met in a timely fashion.

Quality Management

Quality Assurance ensures a process is developed to review deliverables against expectations before they are submitted so that the deliverable meets expectations. Quality Control assesses project deliverables to ensure they map to the defined quality standards and variance thresholds. The **Consulting team** will assist with:

- Developing a Quality Management Plan that includes quality assurance and control standards and metrics.
- Training your staff to perform deliverable reviews from a quality management perspective for adherence to the contract.



Schedule Management

The purpose of Schedule Management is to know where the project is against the projections and how changes affect the delivery time. It is critically important to develop and update the schedule regularly to determine how the project is progressing. The **Consulting team** will assist with:

- Developing a Schedule Management Plan.
- Developing an integrated project schedule that includes dependencies (which yields the critical path) along with resource loading which will inform the Project Manager if there are sufficient staff on the project.
- Developing the project baseline schedule.
- Identifying schedule inputs to the level of detail defined in the Master Project Plan.

Interface Management

Early identification of interfaces will help ensure free flow of data and function between the new solution and partner agencies. Without knowing how many interfaces there are, there are ramifications to all facets of the project. The **Consulting team** will assist with:

- Developing an Interface Management Plan.
- Ensuring that the interface matrix and plan includes all the parties' scope definitions and acceptance criteria.

Implementation Management

Planning for system implementation is critical to successful project execution. Determining whether the 'big bang' or a phased roll-out works best for your new system is key to your project plan. The **Consulting team** will assist with:

- Developing an Implementation Plan.
- Identifying activities that must be included in your project plan to reflect the approach.
- Training staff to understand how the roll-out approach impacts communication, change management, site readiness and other facets of your project.
- Monitoring system rollout and certification.





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so that we can, together, determine how
we can help you best!

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