

# Vendor Forum

*Introduction to the  
Project Delivery Lifecycle*

**March 12, 2025**



California  
DEPARTMENT OF TECHNOLOGY

# Jared Johnson

*Deputy State Chief Information Officer and  
Chief Deputy Director  
California Department of Technology*



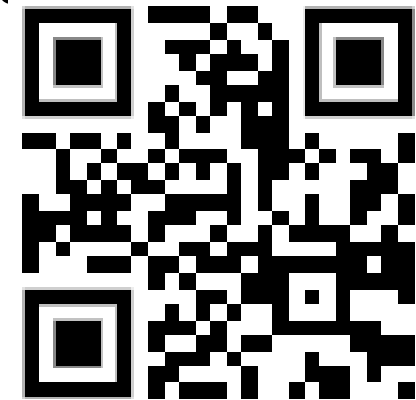
# Welcome

# Executive Order N-12-23



3.c. By January 2025, the Government Operations Agency, the California Department of General Services, and the California Department of Technology **shall update the State's project approval, procurement, and contract terms**, incorporating analysis and feedback obtained through the processes outlined in 3.a. and 3.b.

Link to EO: <https://tinyurl.com/2rrfdshd>



# GenAI for CA Website

## California is the home of GenAI

Learn what CA is doing



<https://www.genai.ca.gov/>

- News/Reports
- Resources/Links

- Procurement Guidelines
- Self-paced and instructor led training

- User Journeys
- Vendor opportunities



# Sarah Cering

*Branch Chief, Statewide Procurement Policy, Training,  
& Customer Services*

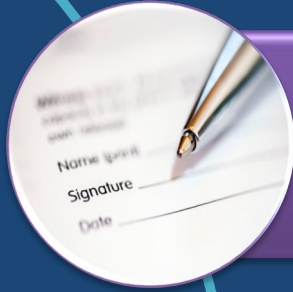
*California Department of General Services*



## GenAI Procurement Policy

# GenAI Procurement Policy

## State Contracting Manual



Solicitation language with new disclosure requirements.



Evaluation and award no longer requires STD 1000 GenAI Reporting and Factsheet.



GenAI contract terms have been incorporated into the IT General Provisions under Section 22.

## Generative Artificial Intelligence

# Sahana Ayer

*Chief Counsel*

*California Department of Technology*



**GenAI Disclosure**  
**GenAI Contract Terms**

# GenAI Disclosure

## GenAI Disclosures



Contractor must notify the State in writing if it intends to provide GenAI as a deliverable to the State.



Intends to utilize GenAI, including GenAI from third parties, to complete all or a portion of any deliverable that materially impacts functionality of a State system risk to the State, or Contract performance.



The term “materially impacts” is defined in the State Administrative Manual (SAM) § 4986.2 Definitions for GenAI.



# GenAI Contract Terms



Includes updates to definitions and protections for state data and intellectual property rights.



Requires Contractors to disclose the use of GenAI, seek state authorization before using non-public state data, and disclose the quality of training data used.



Assurances that the State shall retain all ownership and intellectual property rights to State Data used to augment GenAI Training Data.

## GenAI Contract Terms

# Tim Issertell

*Deputy Director, CA Project Management Office*

*California Department of Technology*



**State Policy Updates  
Project Delivery Lifecycle  
PAL & PDL Side by Side  
Project Workbook  
Implementation Timeline**

# State Administrative Policy Changes



California  
DEPARTMENT OF TECHNOLOGY  
STRATEGY INNOVATION DELIVERY

## State Administrative Manual

- **SAM 4819.2** IT Definitions
- **SAM 4986.1- 4986.13** Generative AI

## State Information Management Manual

- **SIMM 71A and 71B** – Certification of Compliance with IT Policies
- **SIMM 5305-F** – Generative AI Risk Assessment
- **SIMM 19H** – Project Delivery Lifecycle for IT Projects Utilizing GenAI

# State Administrative Policy Changes



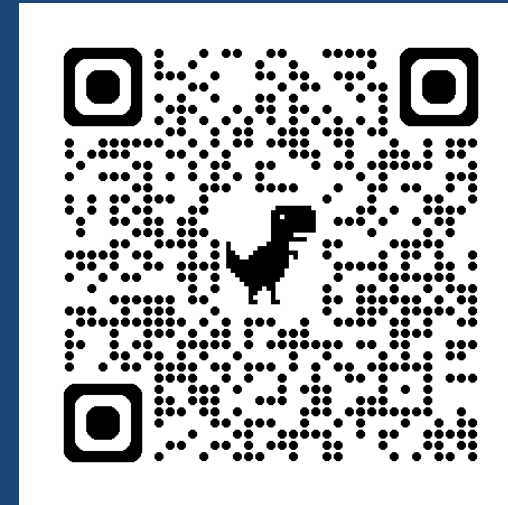
California  
DEPARTMENT OF TECHNOLOGY  
STRATEGY INNOVATION DELIVERY

State Administrative Manual (SAM)



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

State Information Management Manual (SIMM)



[State Information Management Manual \(SIMM\)](#)

# Project Approval Lifecycle (PAL)



\* Legislative Analyst's Office Notification

**Project Planning, Approval, and Oversight for Non-delegated IT Projects**

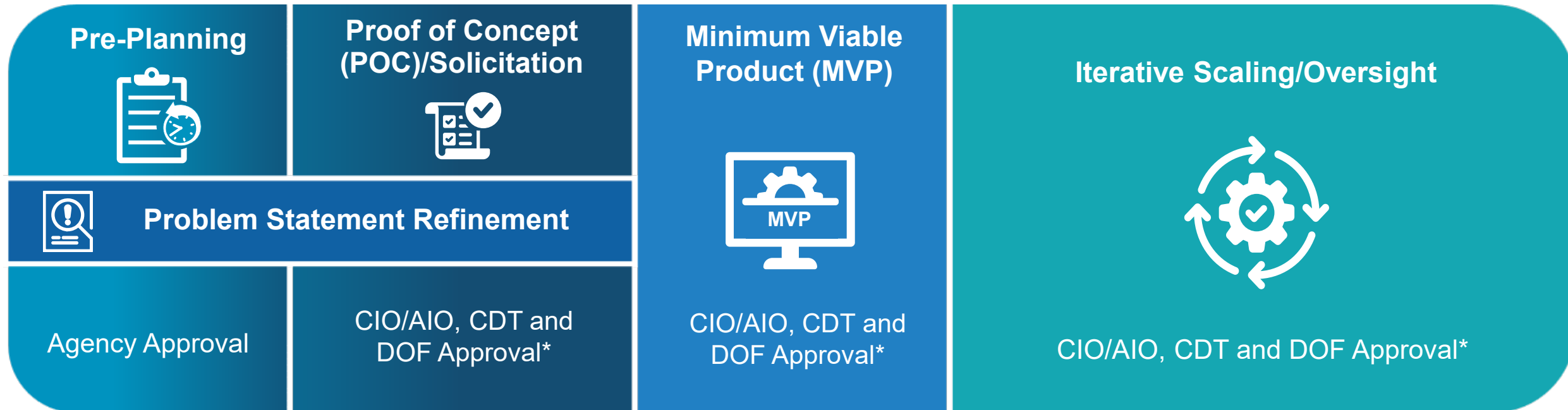


# Project Delivery Lifecycle



May Scale to other Technology Projects in 2026

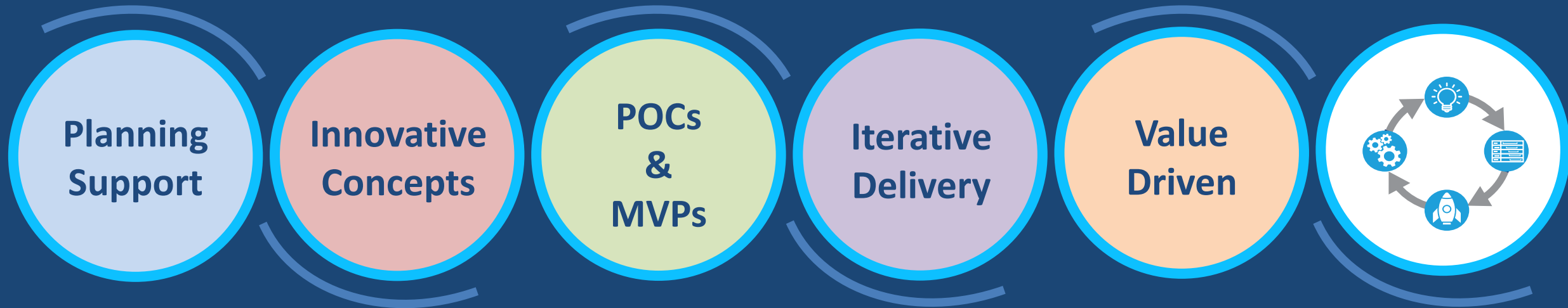
# Project Delivery Lifecycle



\* Legislative Analyst's Office Notification

**Project Planning, Approval, and Oversight for Non-Delegated IT Projects Utilizing GenAI**

# Project Delivery Lifecycle



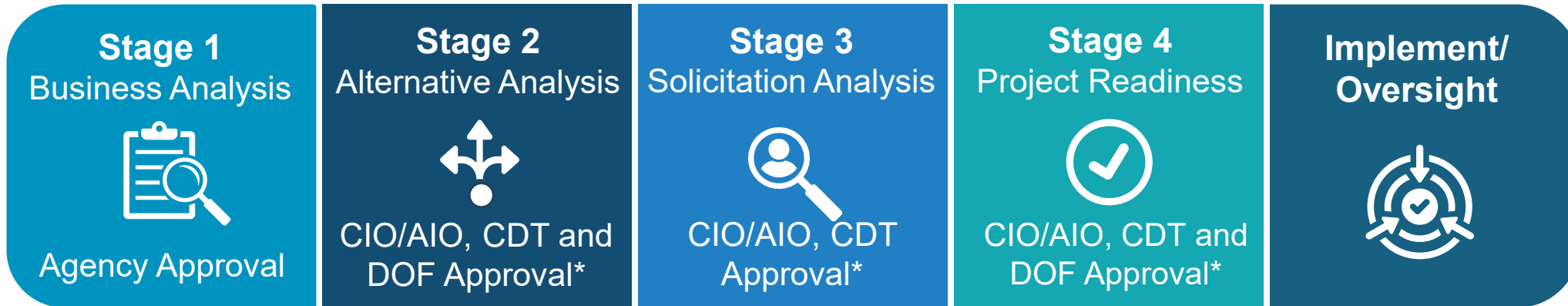
**Project Planning, Approval, and Oversight for Non-delegated Project utilizing GenAI**

# PAL & PDL Side by Side

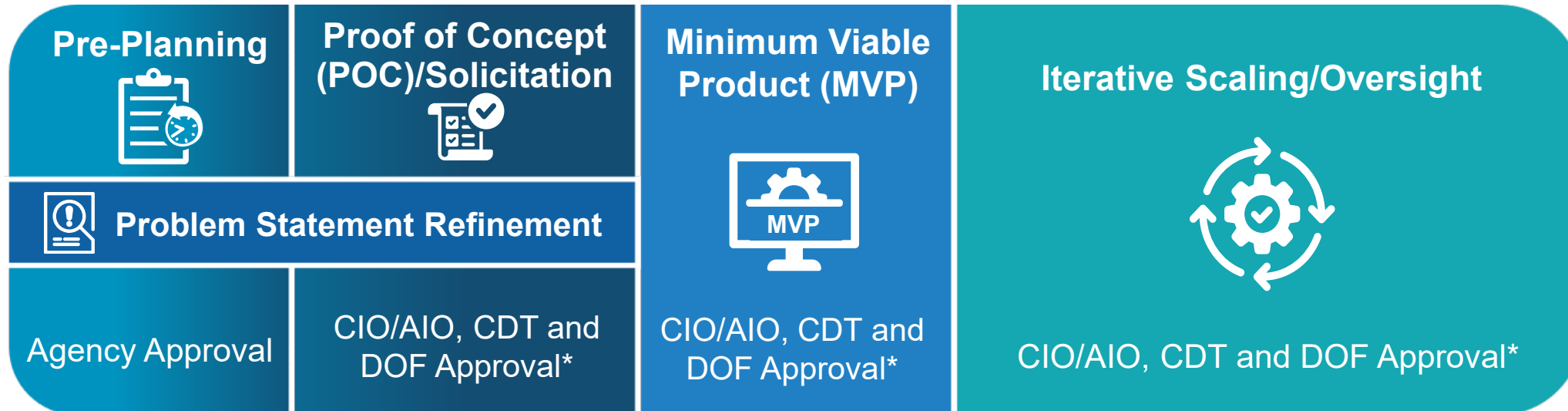


California  
DEPARTMENT OF TECHNOLOGY  
STRATEGY INNOVATION DELIVERY

## Project Approval Lifecycle (PAL) – (Existing)



## Project Delivery Lifecycle (PDL) – (New)



\* Legislative Analyst's Office Notification

# Benefits



**Aligns business readiness, product development, and procurement.**



**Focuses on what is needed, when it's needed**



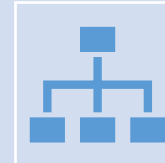
**Encourages market competition by leveraging requests for Innovative Ideas – RFI<sup>2</sup>**



# Project Workbook



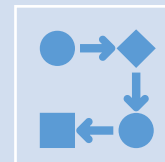
## [Chapter 1](#) - Business Readiness



## [Chapter 2](#) - POC Phase

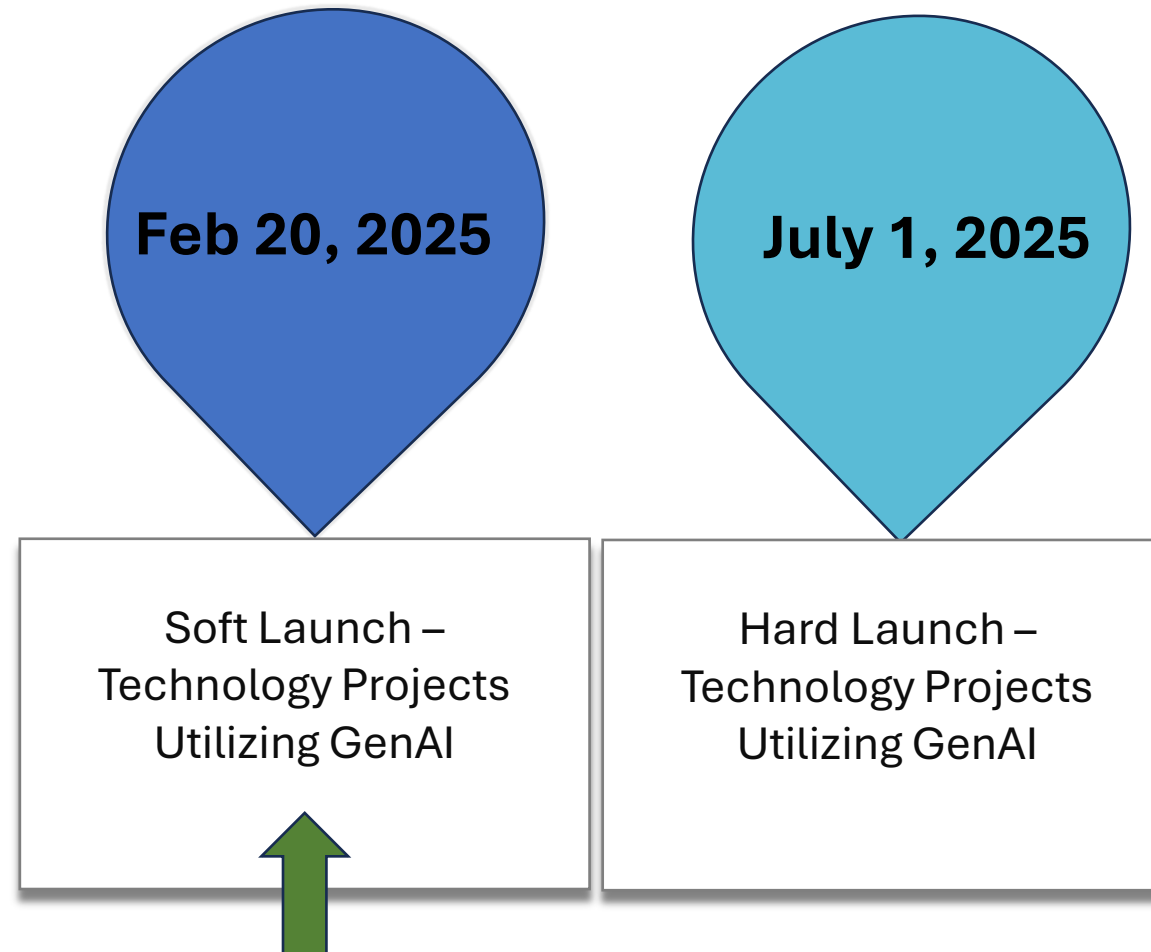


## [Chapter 3](#) - Project Phase 1 (MVP)



## [Chapter 4](#) - Project Phase 2-n (Iterative)

# PDL Implementation Timeline



# Rob Trojan

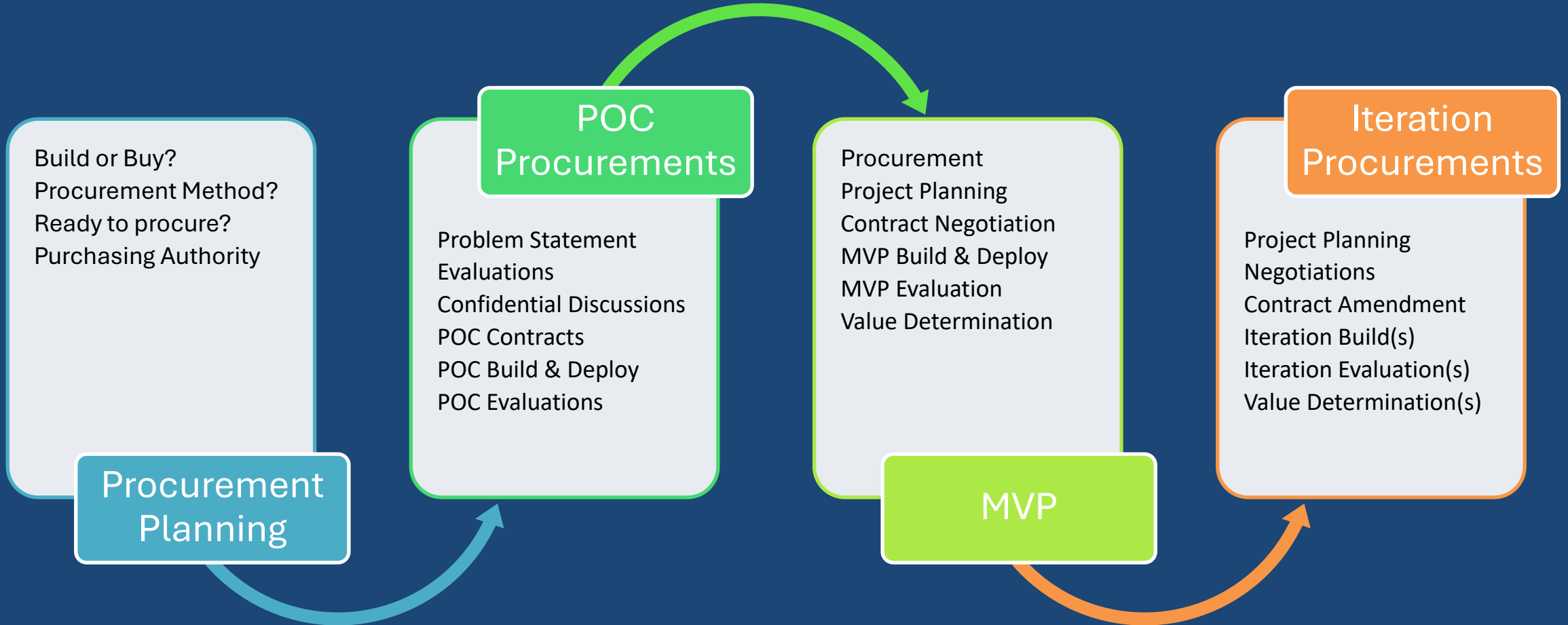
*Assistant Deputy Director, Statewide Technology  
Procurement*

*California Department of Technology*



## RFI<sup>2</sup> Procurement Process

# RFI<sup>2</sup> Procurement Process



# Hayley Figeroide

*Deputy Director, Strategic Initiatives  
Office of Data & Innovation*



## Innovation Lab and Playbook



# Efficiency and Innovation Lab

- The Office of Data and Innovation (ODI) developed an Efficiency & Innovation Lab.
- Designed to support GenAI procurements to improve problem definition, reduce project risk, and improve Californians' customer experience of programs.



## Benefits:

- Data readiness, including inventory and initial assessment
- Problem definition
- Stakeholder and customer mapping
- Use case equity considerations
- Early risk identification
- Defined problem statements
- Defined product team roles and responsibilities
- Executive and leadership awareness and buy-in

# GenAI Innovation Playbook

- ODI has published a GenAI Innovation Playbook to <https://www.GenAI.ca.gov>.
- Offers self-guided worksheets.
- Many of the exercises are also useful to apply at the start of non-GenAI projects.



CALIFORNIA  
Office of Data and Innovation

**GenAI innovation playbook**

January, 2025

**Thank You**



Email your questions to: [projectoversight@state.ca.gov](mailto:projectoversight@state.ca.gov)