

Project Delivery Lifecycle Enhancement

A briefing on the evolution from the Project Approval Lifecycle (PAL) to the enhanced Project Delivery Lifecycle (PDL) for California state technology projects.



Evolution of project approval processes

1. Project Approval Lifecycle (PAL)

Began July 2015. Covers all project types. Emphasizes robust planning and rigor.

2. Project Delivery Lifecycle for GenAI

Began February 2025. Applies to novel GenAI efforts only, using a proof of concept (POC) or minimum viable product (MVP) approach.

3. Project Delivery Lifecycle (PDL)

Will launch July 2026. Covers all project types and is designed to be flexible and scalable.

The escalation of department-level pain points through state advisory channels directly informed the Governor's Executive Order on Generative AI.

1. Departments

Raised concerns to Agencies.

2. Agencies

Escalated to Statewide Advisory Councils.

3. Advisory Councils

Raised concerns to GovOps.

4. Gov Ops

Escalated to the Governor's Office.

5. Governor's Office

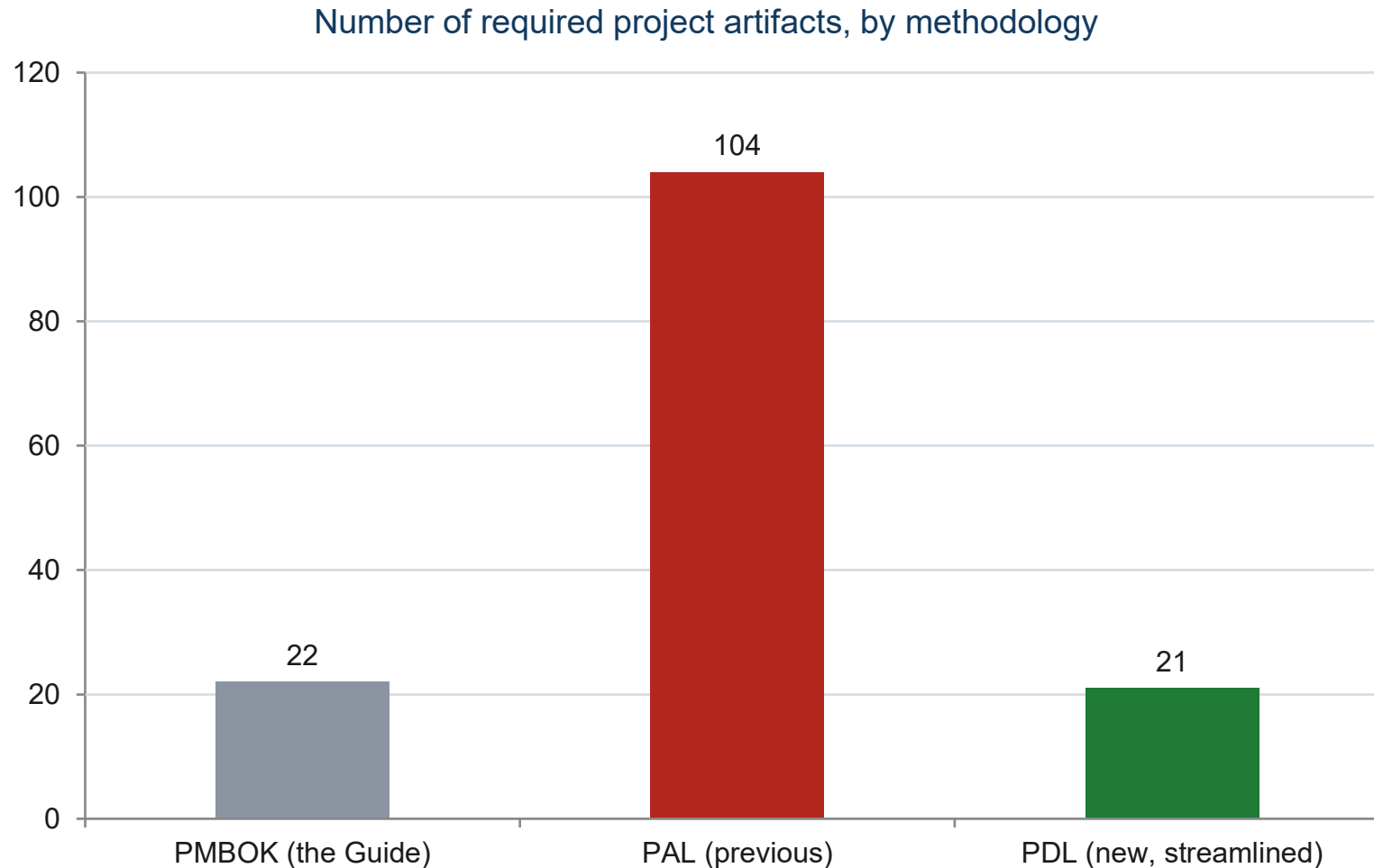
Included in the Executive Order (PDL for GenAI).

Based on user feedback

What we heard	PDL improvement
"More flexibility" (#1 request)	Increased flexibility
"Too many approvals"	Fewer approvals and signatures
"Information requests repeated"	Single-source requests
"Too many project plans"	One scalable template
"Takes too long"	Streamlined process
"Instructions disconnected"	Workbook links to job aids
"PAL doesn't fit with Agile"	PDL adapts to iterative methodology

Benefits – Reduced Artifacts

From user interviews: “Focus is on process and paperwork rather than the product.”



80% reduction

in required artifacts, from PAL to the new PDL.

Relationship Between Lifecycles (PAL and PDL)

Four parallel processes — the approval lifecycle, the delivery lifecycle, the system development lifecycle, and organizational change management — against five overall project phases: Concept, Initiate, Planning, Executing, and Closing.

Process	Order of steps	Project phases spanned
Project Approval Lifecycle (PAL) — stages	Business Analysis; Alternative Analysis; Procurement Management; Project Readiness & Approval	Initiate through Planning
Project Delivery Lifecycle (PDL) — chapters	Ideation; Business Readiness; Solution Evaluation; Project Baselines; Iterations; Iterations/Project Close	Concept through Closing (oversight continues across Planning and Executing)
System Development Life Cycle	Plan; Analyze; Design; Build; Test; Implement; Maintenance & Operations	Planning through Closing
Organizational Change Management	Change Readiness (Concept); Leadership Alignment (Initiate); PM/Change Manager Integration (Planning); Early Stakeholder Engagement (Executing); Sustained Outcomes (Closing)	Concept through Closing, one focus area per phase

Dimension	PAL	PDL Enhanced
Technology project types	All technology projects	All technology projects
Procurement types	All procurement types	All procurement types
Artifacts	~104	~21
Approvals	7+ (8 signatures)	2+ (3 signatures)
Logical flow	Business Analysis > Alternative Analysis > Procurement Management > Project Approval	Ideation > Planning > Execution > Close
Project workbook	4 stages with 7+ submittals	5 chapters with 5+ submittals
User process	Manual, using templates and email	Manual, using templates and email
Framework	Process heavy	Flexible / scalable
Project Success Workshops	None	In development

PDL Enhanced is for all non-delegated projects.

PDL for GenAI

- Pilot process for initial project approval and oversight of GenAI technology projects
- Uses proofs of concept, RFI2 procurement, and MVP-to-scale execution
- Focuses on innovation for the delivery of business value

PDL Enhanced

- Flexible planning based on the risk and complexity of the project
- Flexible procurement and delivery methods that scale and leverage all vehicles, as needed
- Focuses on the delivery of business value

External factors can have a major impact on project timelines — not just project execution.

1. Ideation Approval

Pre-project work; state entity review.

2. Planning

Market research; analysis workshops; documentation.

3. Procurement

Solicitation; vendor onboarding.

4. Funding

Budget cycle; legislative timing.

Understanding these external factors helps set realistic expectations and improve project delivery outcomes.

1. Business Readiness

Completion acknowledgement.

2. Solution Evaluation

Project approval.

3. Project Baselines

Project baselines approved.

4. Iteration-n

Iteration approval required if outside baselines.

5. Iteration or Project Close

Artifact submission for iteration-n or project close. Loops back to the Iteration step for additional iterations.

Ideation completion acknowledgement occurs before Chapter 1 (Business Readiness) begins.

Key activities before entering project delivery

First CDT consult: sizing assessment and complexity assessment review

Category	Items
1. Analysis	Business need; Objectives; Stakeholders
2. Scope	Context diagram; Charter; Gap analysis
3. Risks	Feasibility; Viability; Constraints
4. Data	Clean data; Security; Architecture; Governance
5. Funding / Procurement	Determine funding; Market research; Scope of work; Procurement analysis
6. Planning	As-is and to-be requirements; Organizational change management; Support model

Second CDT consult: ideation review and Chapter 1 kickoff

- Document the most viable solution
- Begin the Chapter 1 workbook

Planning phase (workbook begins here; leads into procurement solicitation activities)

00 — Ideation	01 — Business Readiness (Ch. 1)	02 — Solution Evaluation (Ch. 2)
Initiation/strategic alignment; Sizing & complexity assessments; Scoping and modeling; Feasibility & risk assessment; Data readiness; Market research; Requirements elicitation; Funding & procurement readiness; Project Success Workshops; Solution selection ✓ Completion acknowledgement	Strategic goals; Project charter; Objectives/KPIs; RACI; Estimates (cost/time); Risk & complexity; Funding & FAW*; Market research documented ✓ Completion acknowledgement	Requirements matrix; Updated complexity assessment; Updated schedule estimate; Updated FAW; Risk/issues log; Planned procurements; As-is/to-be diagrams; EA/solution design; Customer survey ✓ Project approval (funding/solicitation)

**Note: Project funding is the State Budget process, not the project approval process.*

Execution phase & oversight

03 — Funding/Procurements (Ch. 3)	04 — Iteration(s) (Ch. 4)	05 — Iteration(s)/Project Close (Ch. 5)
Cost baseline (FAW); Schedule baseline; Requirements baseline; Vendor/contract information; Project management plan ✓ Project approval (contract award)	For each iteration: planned cost, schedule, scope. Overall project: solution design, requirements, schedule, cost (FAW), risk & complexity, and PMP updates. ✓ Approval required if outside baselines (±10%)	For each iteration: realized cost, schedule, scope; iterative value report; updated FAW. Final iteration/close: iterative value report, updated FAW, solution acceptance, M&O procurement plan, customer service survey. ✓ Iteration review or project closeout

The primary contract is signed between the Funding/Procurements chapter and the Iteration(s) chapter. Note: Project funding is the State Budget process, not the project approval process.

SAM — 40+ updates

- SAM: high-level mandatory policies for state agencies — the “what.”
- Removing “PAL” language and replacing it with generic terminology
- Removing out-of-date information
- Correcting information links

SIMM — 80 updates

- SIMM: instructions on implementing those policies — the “how.”
- Removing “PAL” language and replacing it with generic terminology outside of SIMM19
- Removing out-of-date information
- Correcting information links

Being retired and replaced with a new design

Retiring / past

- Business/technical and PM risk assessments kept separate
- Subjective questions form the basis of scoring
- Scoring is manually selected
- One chart for analysis (heatmap/risk matrix)
- Instructions are in a separate document

Replacing / present

- Assessment consolidation combines all three assessments (business/technical, PM/governance)
- Objective questions with clear metrics
- Scoring is built into measurable answers
- Comprehensive charts (bar, heatmap, and spider)
- Instructions are built directly into the assessment
- New: IV&V is determined based on answers

Based on user feedback

What we heard	We're working on it
"Automate PAL" (#2 request)	Requesting funding
"FAW is too complex" (#3 request)	Requesting funding
"Share lessons learned"	Waiting on automation
"Share solutions implemented"	Waiting on automation
"Cost estimation"	Requesting funding
"Continuing education"	Building Success Workshops

High-level curriculum

- Product Management
- Architecture Planning
- Project Governance
- Contract Management
- Risk Management
- Organizational Change Management

Survey milestones

1. Customer Service Survey

Following Chapter 3 (PDL Planning).

2. Post Go-Live Survey

Following launch (PDL Execution).

“We all need people who will give us feedback. That's how we improve.” — Bill Gates

The foundation is now in place. The next phase focuses on leveraging automation to reduce manual effort, improve consistency, and accelerate delivery.

PDL Briefings! Held over Zoom, all sessions the same, divided by OSPD divisions.

Date & time	Departments / agencies
July 21, 2:00 PM	CalHHS
July 22, 11:00 AM	CalEPA, Labor, CDE, CalVet, CSAC, CDFA, CMD
August 5, 10:00 AM	CalSTA, DOJ, DOF, FI\$Cal, Judicial, HSR, SCO, STO, CNRA, CPUC, Governor's Office, CalOES, SOS
August 6, 1:00 PM	GovOps, BCSH, CDCR, CCHCS, CDI

Attend one or more!

A Big Thank You — To Everyone Who Contributed

Your expertise, collaboration, and dedication made the improvements to PDL Enhanced possible.



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Thank you for attending this briefing on the Project Delivery Lifecycle Enhancement. We welcome your questions.