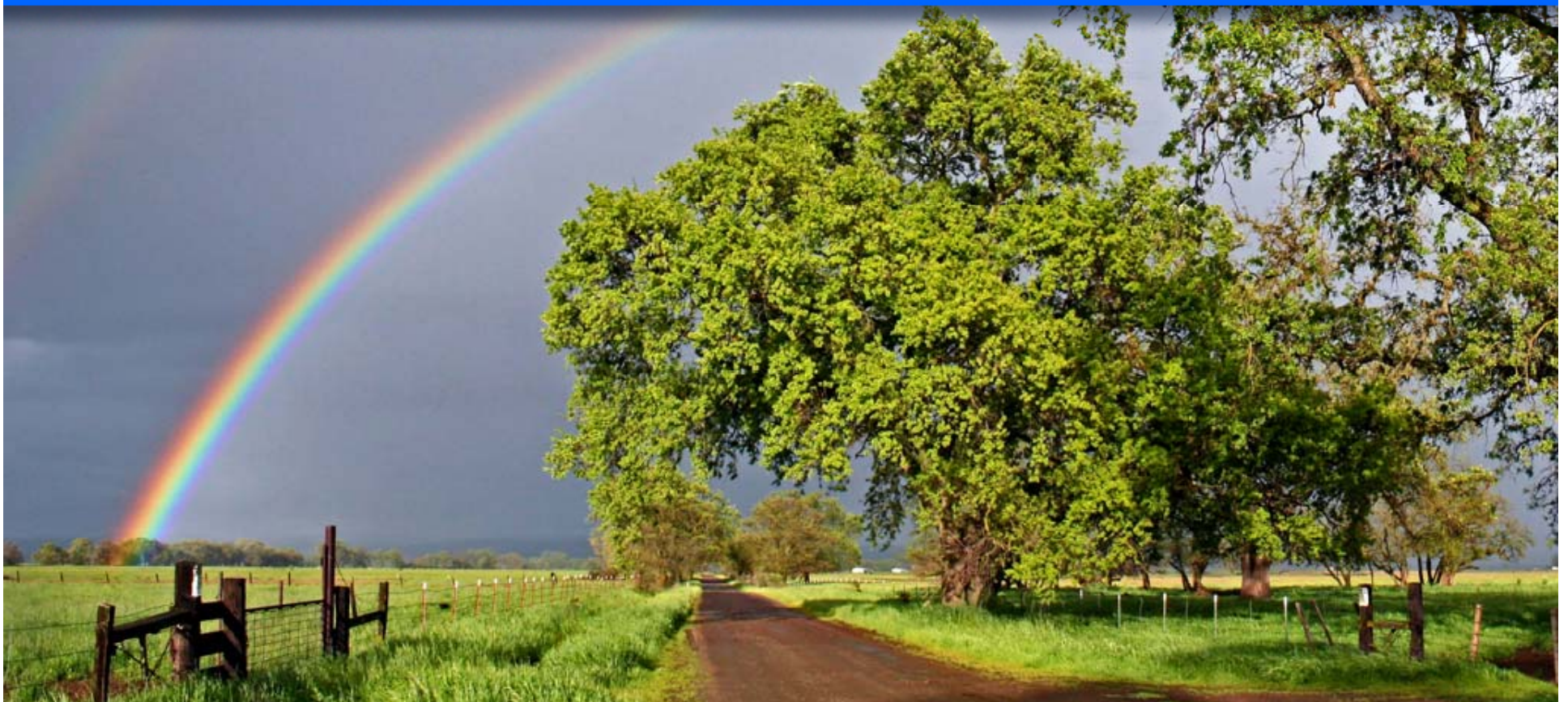




CA DEPARTMENT OF
FOOD & AGRICULTURE

IT Project Governance

Chris Cruz, Deputy Agency Information Officer



IT Project Governance Agenda

- Key Challenges in Today's Organizations
- Areas of Focus for Project Governance
- PMO Governance
- PMO Governance Tool
- Handouts
- Q & A
- Contact Information

Key Challenges in Today's Organizations

- Providing executive staff with project health & resource requirements
- Understanding the impact of new projects on the existing project queue
- Providing improved resource allocation management
- Collaboration and communication across and within project teams
- Addressing the organizational change that is required to meet the vision of moving to the next level of project management
- Answering “What’s in it for me?” for the project managers and team members who will be providing the data points to enable the solution

Are you doing the right things to feed your organizational strategy?

Areas of Focus for IT Project Governance

- ✓ Strategic Alignment
- ✓ Value Delivery
- ✓ Resource Management
- ✓ Risk Mitigation
- ✓ Performance Measurement



ABC: An Introduction to Governance, May 22, 2007

Define Project Governance

- Governance is a subset of IT Governance.

Project Governance is the rules and regulations under which an IT project functions. As with IT Governance, it covers the mechanisms put in place to ensure compliance with those standards.

Components of IT Project Governance

- Senior Management Support (Projects Management Office for Executive Sponsorship)
- Define roles and responsibilities:
 - Project Sponsor
 - Project Managers
 - Resource Managers
 - Project Team Members
 - Stakeholders
- Define rules of engagement that support
 - Tasks Budget Documents
 - Milestones Roles
 - Risks Issues

Key IT Project Drivers & Questions

Key Drivers

- Heavy demands on a limited staff
- Projects competing for limited dollars
- Demand for quantifiable performance measures and for quality service delivery
- Project continuity through funding cycles

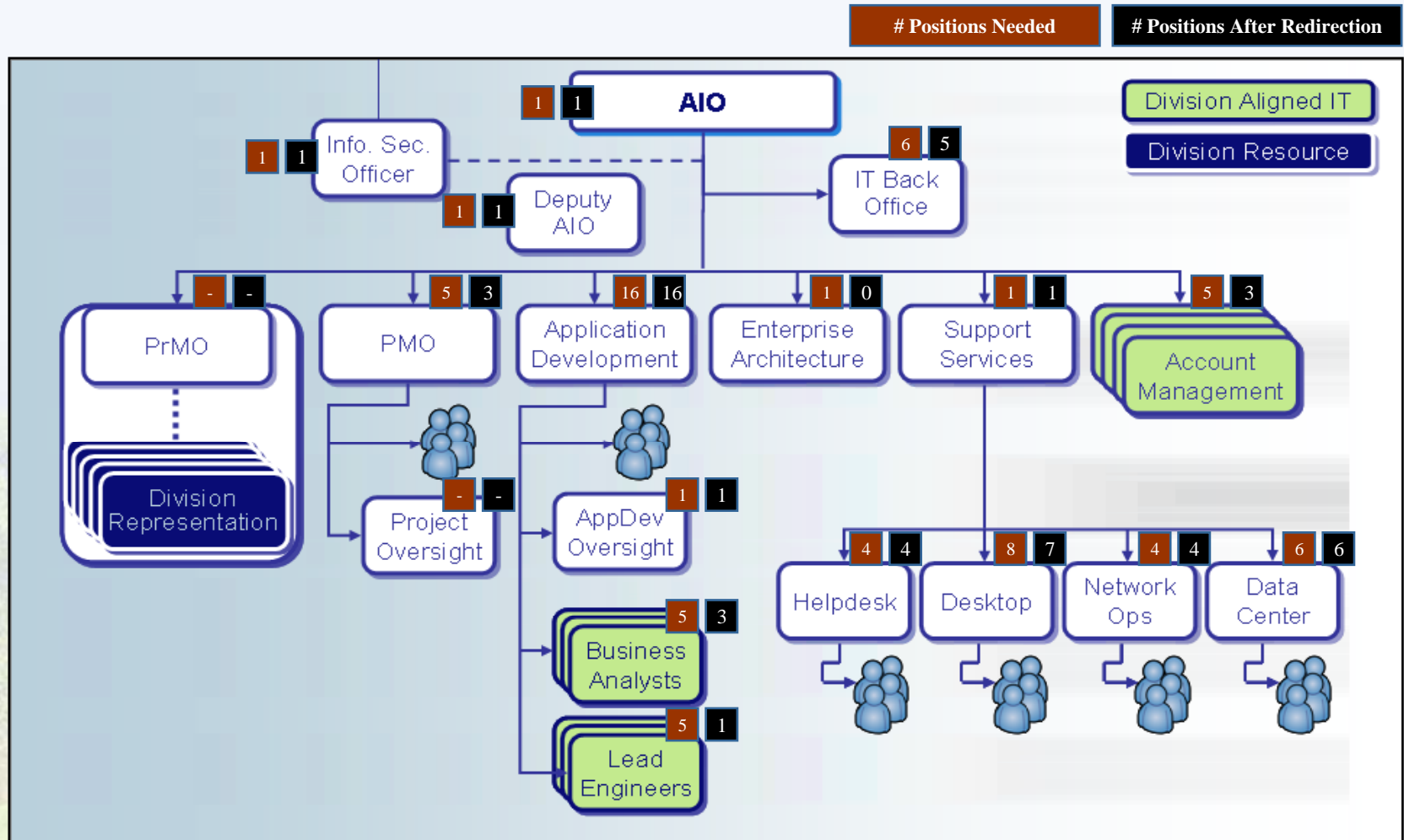
Key Questions

- What is the best value for selected investments? How do you measure the value?
- How do you ensure that investments are strategically aligned with business objectives? Strategic Priority? Fit?
- How do you realign investments in response to changing external and internal conditions, new processes and business enablers?
- How do you make Go/No Go decisions on projects?
- How do you determine future/replacement investments?

Key Project Governance: Warning Signs to Failure

- Ambiguous or diffused project ownership
- Stakeholder complexity
- Conflicts of Interest
- Requirement Inconsistencies (Among Stakeholders)

CDFA Placement of PrMO Organization



CDFA IT Project Governance Portfolio Approval Process

1

Business area develops IT project concept statement with ITS Account Manager and submits to Division Director for approval

2

Division level approves concept statement, based on Governance Council guidelines, submits to AIO/DAIO

3

AIO/DAIO places project on Governance Council calendar

4

Governance Council reviews project statement, may solicit additional information from business group or Advisory Committee

5

Project statement forwarded to executive level for approval

6

Upon approval, FSR study team proceeds with study, completes FSR, ITPP and other required documents



CDFA Project Governance Tools Portfolio and Project Management

- Portfolio Manager Module
- Project Management Module
- Financial Management Module
- Knowledge Store Module

<http://204.193.177.103/niku/app?action=security.staticLogin>



CDFA IT Governance Project Overview Portfolio Management Clarity

CLARITY
Search [Advanced]
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Overview: General

General | Sponsor | Portfolio Dashboard | Program Dashboard | PM Alerts | Project Dashboard | Issues and Risks | Tasks

My Projects

Project	Status
CDFA Operational Recovery Plan-2007 Project	◆
Clarity	◆
Division Centralization Project	◆
Emerging Threats Phase I	◆
Emerging Threats Program	◆
Emerging Threats Research Contract	◆
Statistics Database	◆
Test Clarity Project	◆

New | New from Template

Open Milestones [--Actions--]

There are no items to display

Notifications

Action Items	0
Change Requests	0
Discussions	0
Documents	0
Escalations	0
Events	0
Finance	0
Incidents	0
Issues	0
Processes	0
Projects	1
Reports and Jobs	5
Requisitions	0
Risks	0
Timesheets	1

View All

Issues [--Actions--]

Filter [--Select--] [Expand Filter]

There are no items to display

Action Items

View: Action Items Assigned to Me

There are no action items to display.

New

My Reports

Name	Report Type	Saved Parameters
<input type="checkbox"/> Capacity vs Demand by Resource	Capacity vs Demand By Resource	✓
<input type="checkbox"/> Key Tasks and Milestone Status	Key Tasks and Milestone Status	
<input type="checkbox"/> OBS Listing	OBS Listing	
<input type="checkbox"/> Project Listing	Project Listing	
<input type="checkbox"/> Resource Assignments	Resource Assignments	
<input type="checkbox"/> Resource Listing	Resource Listing	
<input type="checkbox"/> Resource List by Primary Role	Resource Listing	✓
<input type="checkbox"/> Skills Listing	Skills Listing	

Remove [More]

Site Links

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May 14, 2009

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CDFA IT Portfolio Baseline Report

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Overview: Sponsor

General **Sponsor** Portfolio Dashboard Program Dashboard PM Alerts Project Dashboard Issues and Risks Tasks

AIO Baseline Report [--Actions--]

Filter [--Select--] [Expand Filter]

Status Indicator	ID	Project	Manager	Goal	Stage Progress	Delivery Timeline							
						Q1 2007	Q2 2007	Q3 2007	Q4 2007	Q1 2008	Q2 2008	Q3 2008	Q4 2008
◇	CDFA-00011	Test Program	Fears, Katie	Infrastructure Improvement	Progress bar								
◆	DMB Plan	Statistics Database	Fears, Katie	Promote CA Agricultural Products	3 - System Design		█	█	█	█	█	█	█
◇	CDFA-00021	Test Clarity Project	Fears, Katie	Infrastructure Improvement	4 - Development & Construction								
◇	CDFA-00001	Clarity Implementation	Fears, Katie	Infrastructure Improvement	Progress bar								
◆	CDFA-00004	Clarity	Fears, Katie	Grow the Business	5 - Implementation								
◆	CDFA-00023	Division Centralization Project	Fears, Katie	Strategic Planning to Address Future Needs	3 - Execution Process		█	█	█	█	█	█	█
◇	CDFA-00010	Testing Project	Fears, Katie	Cost Avoidance	Analyze								
◆	CDFA-00008	CDFA Operational Recovery Plan-2007 Project	Paige, Chris	Maintain the Business	4 - Controlling Process								
◆	CDFA-00040	Emerging Threats Phase I	Adishes, Ramaswamy	Pest & Disease Prevention	3 - System Design	█	█	█	█	█	█	█	█
⚠	CDFA-00058	Emerging Threats Program	Adishes, Ramaswamy	Pest & Disease Prevention	2 - Planning Design	█	█	█	█	█	█	█	█
⚠	CDFA-00059	Emerging Threats Research Contract	Adishes, Ramaswamy	Pest & Disease Prevention	2 - Requirements Determination								
◆	CDFA-00057	Inspection Services Business Analysis Project	Paige, Chris	Support CA Agricultural Infrastructure	4 - Controlling Process								
◆	CDFA-00055	MARS EFR Development Project	Paige, Chris	Strategic Planning to Address Future Needs	2 - Requirements Determination								
◇	EFR Project	WBS_1	Paige, Chris		Progress bar								
◆	CDFA-00060	Clarity v2	Van Dyck, Charles		Progress bar								

Total Results: 15

Projects By Budgeted Cost [--Actions--]

Filter System Default [Expand Filter]

There are no items that match the filter criteria



CDFA IT Portfolio Dashboard

CLARITY Search [Advanced]

Overview: Portfolio Dashboard [Personalize][Manage My Tabs]

General Sponsor **Portfolio Dashboard** Program Dashboard PM Alerts Project Dashboard Issues and Risks Tasks

Portfolio Benefits and Costs [--Actions--] [Collapse Filter]

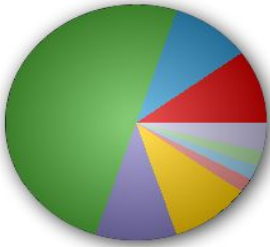
Filter: Total Objectives Portfolio [Collapse Filter]

Parent Portfolio: Total Objectives Portfolio

Portfolio(s)

Filter Show All Save Filter Clear

Download the SVG Viewer for additional graph features



- Infrastructure Improvement
- Business Process Improvement
- Development/Implementation
- Emergency Response
- Disaster/Operational Recovery
- HW/SW Upgrade & Deployment
- Inventory Control
- Relocation/Renovation
- Organizational Improvement

My Portfolios [--Actions--] [Collapse Filter]

Filter: [--Select--] [Collapse Filter]

Parent Portfolio

Portfolio(s)

Filter Show All Save Filter Clear

Portfolio	Portfolio Planned Cost
Business Process Improvement	500,000
Development/Implementation	2,500,000
Emergency Response	500,000
Food Safety	90,000
HW/SW Upgrade & Deployment	100,000
Inventory Control	100,000
Marketplace	100,000
Organizational Improvement	200,000
Pest & Disease Prevention	1,000,000
Promote CA Agricultural Products	900,000
Relocation/Renovation	100,000
Strategic Planning	500,000
Total Goal Portfolio	2,690,000
Total Objectives Portfolio	5,000,000
Aggregation	14,280,000

Portfolio Investment Benefits By Goal [--Actions--] [Collapse Filter]

Filter: [--Select--] [Collapse Filter]

Parent Portfolio

Portfolio(s)

Filter Show All Save Filter Clear

There are no items that match the filter criteria



CDFA IT Project Dashboard

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Overview: Project Dashboard

General Sponsor Portfolio Dashboard Program Dashboard PM Alerts **Project Dashboard** Issues and Risks Tasks

Project Manager Schedule Dashboard [--Actions--]

Filter [--Select--] [Expand Filter]

Status	Project	Start Date	Finish Date	Days Late	Q4 2007		Q1 2008			Q2 2008			Q3 2008			Q4 2008			Q1 2009
					Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆	CDFA Operational Recovery Plan-2007 Project	7/2/07	10/19/07	0	█														
◆	Clarity	7/16/07	10/5/07	5	█														
◆	Clarity v2	8/6/07	2/27/08	62	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Division Centralization Project	3/22/07	7/9/08	0	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Emerging Threats Phase I	8/1/06	6/10/08	172	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Emerging Threats Research Contract	7/12/07	1/8/09		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Inspection Services Business Analysis Project	5/29/07	5/16/08		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	MARS EFR Development Project	8/21/07	11/27/07		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Statistics Database	6/3/07	8/15/08	0	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Test Clarity Project	8/30/07	1/29/08		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
◆	Testing Project	7/30/07	12/31/07		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█

Total Results: 11

Upcoming Milestones - Due in Next 30 Days [--Actions--]

Schedule	Project	Milestone	Due Date	Days Late
◆	Statistics Database	Project Plan Accepted	8/20/07	0
◆	Division Centralization Project	Phase VI - Transition of AHFSS IT Staff Complete	9/3/07	0



CDFA IT Project Issues and Risks

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Overview: Issues and Risks

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Project Dashboard
Issues and Risks
Tasks

Issue Management [--Actions--]

Filter [--Select--] [Expand Filter]

Schedule	Priority	Issue ID	Issue Description	Project^	Category	Owner	Target Resolution Date
+	+	ISSUE - 00001	Feedback in the area of Client Relations with the vendor. On more than 1 occasion, scheduled meetings between the client and vendor did not take place because the vendor did not show up or even called with a status on why they were not there.	Statistics Database	Organizational Culture	Paige, Chris	8/15/07

Total Results: 1

■ = Required

Risk Management [--Actions--]

Filter [--Select--] [Expand Filter]

Project^	Owner	risk_name	Risk Description	Impact	Target Resolution Date	Above Threshold
Clarity	Fears, Katie	DHS Clarity Data	DHS Clarity system is version 6 with an Oracle database platform.	⚠	8/16/07	✓
Clarity v2	Fears, Katie	DHS Clarity Data	DHS Clarity system is version 6 with an Oracle database platform.	⚠	8/16/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Requirements not completely specified	Requirements specificifications are not complete for Phase I to clearly define scope.	+	11/30/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Project Staffing	Project is not adequately staffed. Unable to recruit qualified candidates to fill programming positions.	+	10/1/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Staff Experience/Skills	Staff that has been hired may not have the experience needed for this level of development.	+	9/30/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Project Budget Inadequate	Project budget approved in the FSR may not include sufficient funding for actual project requirements.	+	6/30/08	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Availability of USAHerds System	Unable to leverage the USAHerds or ViaHerds system due o IP ownership, design constraints, or code problems.	⚠	9/14/07	✓
Emerging Threats Phase I	Fears, Katie	Requirements Gathering	The number and complexity of processes may be greater than specified.	+	10/31/07	✓
Statistics Database	Fears, Katie	Vendor Resource Change	Vendor's primary application development resource found other employment	⚠	8/14/07	✓

Total Results: 9

■ = Required

May 14, 2009

16



CDFA Financial Management

Clarity :: Cost Plan Details - Microsoft Internet Explorer

Address: http://pmtools.cdfa.ca.gov/niku/app?action=revmgr.costplandetailList&odf_return_to=revmgr.costplanList.project%26id%3D5000009%26ui.page.space%3Dmainnav.work%26object_code%3Dproject&ui.page.space=mainnav.work&id

Cost Plan Detail - Filter

Filter: [--Select--] [Expand Filter]

Buttons: Add, Delete, Populate From Resource Plan, Cancel

		Group By	Sub-Group By	Planned Cost	Actual Cost	Remaining Cost	% Total	Cost Detail	
								Jul 1, 2008-Jun 30, 2009	
<input type="checkbox"/>	Agency Facilities		One-time Costs		29,082.00	-29,082.00		Cost	0.00
								Actual Cost	0.00
								Remaining Cost	0.00
<input type="checkbox"/>	Contract Services-IV&V		One-time Costs	240,000.00	85,196.50	154,803.50	4.78%	Cost	40,000.00
								Actual Cost	21,566.50
								Remaining Cost	18,433.50
<input type="checkbox"/>	Contract Services-Other Expenses		One-time Costs		0.00	0.00		Cost	0.00
								Actual Cost	0.00
								Remaining Cost	0.00
<input type="checkbox"/>	Contract Services-Project Management		One-time Costs		0.00	0.00		Cost	0.00
								Actual Cost	0.00
								Remaining Cost	0.00
<input type="checkbox"/>	Contract Services-Project Oversight		One-time Costs	240,000.00	85,196.50	154,803.50	4.78%	Cost	40,000.00
								Actual Cost	21,566.50
								Remaining Cost	18,433.50
<input type="checkbox"/>	Contract Services-Software Customization		One-time Costs	277,447.00	0.00	277,447.00	5.52%	Cost	33,026.00
								Actual Cost	0.00
								Remaining Cost	33,026.00
<input type="checkbox"/>	Data Center Services		One-time Costs		0.00	0.00		Cost	0.00
								Actual Cost	0.00
								Remaining Cost	0.00
<input type="checkbox"/>	Hardware Purchase		One-time Costs	170,000.00	103,344.00	66,656.00	3.38%	Cost	0.00
								Actual Cost	0.00
								Remaining Cost	0.00
<input type="checkbox"/>	Other Expenses		One-time Costs	944,266.00	373,341.89	570,924.11	18.79%	Cost	144,332.00
								Actual Cost	12,654.89
								Remaining Cost	131,677.11
<input type="checkbox"/>	Software Purchase/License		One-time Costs	0.00	124,042.00	-124,042.00	0.00%	Cost	0.00
								Actual Cost	12,159.00
								Remaining Cost	-12,159.00
<input type="checkbox"/>	Staff (Salaries & Benefits)		One-time Costs	3,126,462.00	1,105,633.66	2,020,828.34	62.23%	Cost	558,382.00
								Actual Cost	299,874.66
								Remaining Cost	258,507.34
<input type="checkbox"/>	Telecommunications		One-time Costs	26,000.00	15,991.00	10,009.00	0.52%	Cost	3,000.00
								Actual Cost	0.00
								Remaining Cost	3,000.00
Total				5,024,175.00					

Total Results: 12

Buttons: Add, Delete, Populate From Resource Plan, Cancel

Done Internet



CDFA Knowledge Store

Clarity :: Knowledge Store - Microsoft Internet Explorer

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Knowledge Store

Search: Go [Advanced]

Top

<input type="checkbox"/>	Name	Size	Type	Status	Modified	Last Downloaded	Actions
<input checked="" type="checkbox"/>	Clarity Application Training Materials				11/26/08 10:21 AM		[-- Actions --]
<input type="checkbox"/>	CA Clarity User Guides				6/30/08 10:01 AM		[-- Actions --]
<input type="checkbox"/>	CA Sample Training Documents				6/30/08 10:00 AM		[-- Actions --]
<input type="checkbox"/>	Clarity Notes from Boot Camp				6/11/08 11:42 AM		[-- Actions --]
<input type="checkbox"/>	Reset Clarity User Password				11/26/08 6:53 AM		[-- Actions --]
<input type="checkbox"/>	CDFA Clarity Implementation.ppt	3,145 KB	MS PowerPoint	Final	5/30/08 1:58 PM		[-- Actions --]
<input type="checkbox"/>	Clarity - OWB and MSP Interface Instructions.pdf	129 KB	Adobe Acrobat	General Information	6/30/08 1:58 PM		[-- Actions --]
<input type="checkbox"/>	Clarity - OWB and MSP Interface Instructions.ppt	435 KB	MS PowerPoint	General Information	6/30/08 1:58 PM		[-- Actions --]
<input type="checkbox"/>	Clarity Folder-Document Access.ppt	478 KB	MS PowerPoint	General Information	6/23/08 9:03 AM		[-- Actions --]
<input type="checkbox"/>	Clarity MSP Integration For CDFA.ppt	978 KB	MS PowerPoint		1/2/08 12:39 PM		[-- Actions --]
<input type="checkbox"/>	Clarity Overview 11-14-07 Final.ppt	4,949 KB	MS PowerPoint		1/2/08 12:39 PM		[-- Actions --]
<input type="checkbox"/>	Clarity Training Handouts 12-17-07.ppt	7,637 KB	MS PowerPoint	General Information	6/11/08 11:24 AM		[-- Actions --]
<input type="checkbox"/>	Clarity training materials day 2.ppt	1,807 KB	MS PowerPoint		1/2/08 12:39 PM		[-- Actions --]
<input type="checkbox"/>	Read Me.pdf	2 KB	Adobe Acrobat		11/26/08 8:25 AM		[-- Actions --]

Copy Move Delete

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CDFA IT Project Dashboard

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Overview: Project Dashboard
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Project Dashboard
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Tasks

Project Manager Schedule Dashboard
[--Actions--]

Filter [--Select--]
[Expand Filter]

Status	Project	Start Date	Finish Date	Days Late	Q4 2007		Q1 2008			Q2 2008			Q3 2008			Q4 2008			Q1 2009				
					Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan			
◆	CDFA Operational Recovery Plan-2007 Project	7/2/07	10/19/07	0	[Gantt bar]																		
◆	Clarity	7/16/07	10/5/07	5	[Gantt bar]																		
◆	Clarity v2	8/6/07	2/27/08	62	[Gantt bar]																		
◆	Division Centralization Project	3/22/07	7/9/08	0	[Gantt bar]																		
◆	Emerging Threats Phase I	8/1/06	6/10/08	172	[Gantt bar]																		
◆	Emerging Threats Research Contract	7/12/07	1/8/09		[Gantt bar]																		
◆	Inspection Services Business Analysis Project	5/29/07	5/16/08		[Gantt bar]																		
◆	MARS EFR Development Project	8/21/07	11/27/07		[Gantt bar]																		
◆	Statistics Database	6/3/07	8/15/08	0	[Gantt bar]																		
◇	Test Clarity Project	8/30/07	1/29/08		[Gantt bar]																		
◇	Testing Project	7/30/07	12/31/07		[Gantt bar]																		

Total Results: 11

Upcoming Milestones - Due in Next 30 Days
[--Actions--]

Schedule	Project	Milestone	Due Date	Days Late
◆	Statistics Database	Project Plan Accepted	8/20/07	0
◆	Division Centralization Project	Phase VI - Transition of AHFSS IT Staff Complete	9/3/07	0



CDFA IT Project Issues and Risks

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Overview: Issues and Risks

General Sponsor Portfolio Dashboard Program Dashboard PM Alerts Project Dashboard **Issues and Risks** Tasks

Issue Management
[--Actions--]

Filter [--Select--]
[Expand Filter]

Schedule	Priority	Issue ID	Issue Description	Project^	Category	Owner	Target Resolution Date
+	+	ISSUE - 00001	Feedback in the area of Client Relations with the vendor. On more than 1 occasion, scheduled meetings between the client and vendor did not take place because the vendor did not show up or even called with a status on why they were not there.	Statistics Database	Organizational Culture	Paige, Chris	8/15/07

Total Results: 1

+ = Required

Risk Management
[--Actions--]

Filter [--Select--]
[Expand Filter]

Project^	Owner	risk_name	Risk Description	Impact	Target Resolution Date	Above Threshold
Clarity	Fears, Katie	DHS Clarity Data	DHS Clarity system is version 6 with an Oracle database platform.	⚠	8/16/07	✓
Clarity v2	Fears, Katie	DHS Clarity Data	DHS Clarity system is version 6 with an Oracle database platform.	⚠	8/16/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Requirements not completely specified	Requirements specifications are not complete for Phase I to clearly define scope.	+	11/30/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Project Staffing	Project is not adequately staffed. Unable to recruit qualified candidates to fill programming positions.	+	10/1/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Staff Experience/Skills	Staff that has been hired may not have the experience needed for this level of development.	+	9/30/07	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Project Budget Inadequate	Project budget approved in the FSR may not include sufficient funding for actual project requirements.	+	6/30/08	✓
Emerging Threats Phase I	Adishes, Ramaswamy	Availability of USAHerds System	Unable to leverage the USAHerds or ViaHerds system due o IP ownership, design constraints, or code problems.	⚠	9/14/07	✓
Emerging Threats Phase I	Fears, Katie	Requirements Gathering	The number and complexity of processes may be greater than specified.	+	10/31/07	✓
Statistics Database	Fears, Katie	Vendor Resource Change	Vendor's primary application development resource found other employment	⚠	8/14/07	✓

Total Results: 9

+ = Required

Preventing Failure: Removing Obstacles to Success

- Diagnose and measure the real obstacles to failure
- Share knowledge and lessons learned to improve success rates
- Embed innovation around IT project success in the organization
- Evaluate your organizations collaboration capabilities
- Be fearless and brave and do what's right



Handouts

- Project Management Methodology
- Project Lifecycle Documentation



Questions and Answers Session

- Q&A



Let's Have Coffee

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