

California Project Management Framework (CA-PMF) - Key Elements

	 Concept	 Initiating	 Planning	 Executing	 Closing	 Monitoring & Controlling
 Recommended Practices	<ul style="list-style-type: none"> Validate the Concept for a Strong Foundation Have a Strong Business Case Is Your Organization Ready for Change? 	<ul style="list-style-type: none"> Effective Sponsorship is the Key to Success The Business Need Drives the Project Check In with Your Organization's Enterprise Architect or Opportunities May Be Missed Tackle the Project in Bite-Size Pieces to Reduce Risk Implement in Phases instead of a "Big Bang" Engage Stakeholders Strategically Change is Hard, So Start Planning for Your Change Early 	<ul style="list-style-type: none"> It Takes a Village... to Make a Project Successful Connect the Dots... Clarifying Scope No Matter the Size or Scope, the Schedule is a Key Component Who wants to talk about Security? Effective Change Management Requires Close Attention to an Organization's Culture Early Governance Helps Set Stakeholder Expectations Group and Provide Context When Documenting Requirements Clear Performance Metrics Benefit Both Contractors and Project Managers 	<ul style="list-style-type: none"> Don't Ignore the Business Communicate, Communicate, Communicate Capturing Action Items From Team Meetings Early and Effective Testing Can Prevent Major Project Cost Issues Down the Road Problems Don't Go Away - They Get Bigger Over Time Engage the M&O Team Sooner Have Clearly Defined Go/No Go Checkpoints Leadership is the Project Manager's Job Think Globally and Act Strategically Warning Signs: Be on the Lookout Don't Skimp on Quality Testing and Training Activities are NOT Schedule and Cost Buffers Don't be Afraid to Pull the Plug Speak Up to Achieve a Project Win 	<ul style="list-style-type: none"> Recognition is a Must Take Lessons Learned Seriously Don't Forget the PIER 	<ul style="list-style-type: none"> Continually Monitoring & Controlling Throughout the Project See the Big Picture and Practice Integrated Change Control Take Corrective and Preventative Actions Sooner Rather Than Later Manage Project Team and Stakeholders in a Way that Encourages Open Communication About Progress Maintain a Clear View of Ongoing Contractor Performance
 Roles	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor IT Sponsor Business Owner(s) Stakeholders 	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor Stakeholders IT Sponsor Business Owner(s) Project Manager Department of Technology (CDT) 	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor IT Sponsor Business Owner(s) Project Manager Project Team Contract Manager Information Security Officer (ISO) Subject Matter Experts Department of Technology (CDT) Department of Finance (DOF) 	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor IT Sponsor Business Owner(s) Project Manager Stakeholder(s) Department of Technology (CDT) Department of Finance (DOF) Project Support Staff Solutions Vendor 	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor IT Sponsor IT Product Owner(s) Project Manager Transition Support Lead Project Support Staff 	<ul style="list-style-type: none"> Executive Sponsor(s) Project Sponsor Stakeholders IT Sponsor Business Owner(s) Project Manager Department of Technology (CDT)
 Processes	<ul style="list-style-type: none"> Identify the Project Sponsor(s) and Stakeholders Conduct a Readiness Assessment Project Approval Process Concept Process Phase Review 	<ul style="list-style-type: none"> Establish Project Staffing Create a Project Library Review Current Documentation Conduct Stakeholder Analysis Perform Charter Analysis Monitoring and Controlling Project Approval Process Initiating Process Phase Review 	<ul style="list-style-type: none"> Prepare for Planning Process Phase Activities Develop Planning Process Phase Artifacts Approve and Baseline Planning Process Phase Artifacts Optimize Planning Process Phase Artifacts Monitoring and Controlling Project Approval Process Conduct Procurements Planning Process Phase Review 	<ul style="list-style-type: none"> Assemble the Resources Prepare for the Executing Process Phase Activities Direct and Manage Project Work Monitor and Control Project Work Develop Project Status Reports Executing Process Phase Review 	<ul style="list-style-type: none"> Prepare for Project Closure Closeout Project Artifacts Conduct Lessons Learned Celebrate Success Administrative Closeout Closing Process Phase Review 	<ul style="list-style-type: none"> Monitoring Change Requests and performing Integrated Change Control (Most Process Phases) Project Sponsor and Manager Monitoring and Reviewing the Outputs (Concept and Initiating) Monitoring Risk, Issues and the Project Schedule (Most Process Phases) Continued Oversight of the Project Work (Executing) Analyze and Review Project Work (Executing) Manage Stakeholder Engagement (Most Process Phases)
 Activities	<ul style="list-style-type: none"> Identify the Specific Business Problem or Opportunity Establish a Clear Business Case Assess the Organizational Impact Complete the Concept Development and Readiness Assessment Conduct a High-Level Risk Assessment Begin drafting the S1BA (PAL) Complete the Concept Process Phase Checklist 	<ul style="list-style-type: none"> Identify Project Sponsorship Identify a Project Manager Form the Project Planning Team Create Project Document Repository and Review Current Documentation Identify Stakeholder Project Priorities Create a RACI Matrix Develop the Scope Statement Develop the Budget Estimate Develop the Schedule Estimate Document Assumptions, Constraints, and Risks Develop the Project Charter Monitor & Control the Project Complete the S1BA (PAL) Complete the Initiating Process Phase Checklist 	<ul style="list-style-type: none"> Complete the Complexity Assessment Update the RACI Matrix Hold Planning Process Phase Kickoff Meeting Set Project Practices Develop the Project Management Plan (PMP) Develop Subordinate Project Plans Develop the Work Plan Baseline Project Plans Optimize Project Artifacts Monitor and Control the Project Complete the Planning Process Phase Checklist 	<ul style="list-style-type: none"> Acquire the Project Team and Commit Resources Conduct Contractor On-Boarding Hold Executing Process Phase Kick-Off Transition the Project Manager Responsibilities Execute the Project Management Plan Integrate Project and Contractor Plans Review and Update the RACI Matrix Confirm Scope and Requirements Lead and Manage the Project Team Manage the Contractor Team Manage Stakeholder Expectations Carry Out Project Communications Monitor and Control Project Activities Complete the Executing Process Phase Checklist 	<ul style="list-style-type: none"> Verify Acceptance of All Project Deliverables Resolve or Transfer Ownership of Open Issues Complete Final Project Status Report Archive Final Project Records Conduct Lessons Learned Celebrate Success Conduct Contract Closeout Complete Project Financials Release Staff Release Facilities and Resources Complete Post Implementation Evaluation Report (PIER) Complete the Closing Process Phase Checklist 	<ul style="list-style-type: none"> Manage Change Control, Procurements, Costs, Issues, Project Work, Quality, Requirements, Risks, Schedule, Scope, Communication, and Stakeholder Engagement (Executing) Assess Project Risks (Most Process Phases) Update and Edit the Process Phase Documents (Initiating) Complete Change Request Documentation (Most Process Phases) Review and update the Issue Log, Risk Log, and Project Schedule (Planning and Executing)
 Tools	<ul style="list-style-type: none"> Concept Development and Readiness Assessment Template Stage 1 Business Analysis Template (PAL) Concept Process Phase Checklist Template 	<ul style="list-style-type: none"> Project Priorities Assessment Template RACI Matrix Template Stakeholder Register Template Project Charter Template Status Reports (Oversight) Stage 1 Business Analysis Template (PAL) Project Document Library Repository Project Document Approval Template Initiating Process Phase Checklist Template 	<ul style="list-style-type: none"> Complexity Assessment Template (Oversight) Project Management Plan (PMP) Template and Subordinate Project Document Templates Project Status Reports (Oversight) Stage 2 Alternatives Analysis Template (PAL) Stage 3 Solution Development Template (PAL) Stage 4 Project Readiness and Approval Template (PAL) Planning Phase Checklist Template 	<ul style="list-style-type: none"> Project Status Reports (Oversight) Deliverable Expectation Document (DED) Template Work Authorization Template Process Improvement Plan Template Operational Readiness Assessment (ORA) Template Formal Product Acceptance Template Sponsorship Commitment Survey Template Team Effectiveness Survey Template Executing Process Phase Checklist Template 	<ul style="list-style-type: none"> Issue Log Template Project Status Reports (Oversight) Lessons Learned Template Post Implementation Evaluation Report (PIER) (Oversight) Risk Register template Change Request (CR) template Closing Process Phase Checklist Template 	<ul style="list-style-type: none"> Risk Log Template Issue Log Template Change Request Form and Change Request Log Template Completed Project Plan Templates and Documentation Project Status Report Templates
 Outputs	<ul style="list-style-type: none"> Completed Concept Development and Readiness Assessment Completed High-Level Risk Assessment Draft Stage 1 Business Analysis Completed Concept Process Phase Checklist 	<ul style="list-style-type: none"> Completed Project Priorities Assessment Completed RACI Matrix Completed Stakeholder Register Completed Project Charter Completed Stage 1 Business Analysis (PAL) Established Project Document Library Completed Initiating Process Phase Checklist 	<ul style="list-style-type: none"> Completed Complexity Assessment Completed Project Management Plan (PMP) and Subordinate Project Documents Completed Development of Project Policies Updated RACI Matrix Initial Risk Register Completed Development of the Preliminary Plans Optimized Project Plans Completed Project Approval Lifecycle (PAL) Documents Completed Planning Process Phase Checklist 	<ul style="list-style-type: none"> Completed SDLC Documents Completed Status Reports (Oversight) Completed Deliverable Expectation Document (DED) Completed Work Authorizations Completed Process Improvement Plan Completed Operational Assessment Review (ORA) Completed Formal Product Acceptance Completed Sponsorship Commitment Survey Completed Team Effectiveness Survey Completed Executing Process Phase Checklist 	<ul style="list-style-type: none"> Completed Issue Log Completed Risk Register Completed Change Request Log Completed Lessons Learned documentation Completed Final Status Report(s) (Oversight) Completed Post Implementation Evaluation Report (PIER) (Oversight) Completed Closing Process Phase Checklist 	<ul style="list-style-type: none"> Updated Risk Log Updated Issue Log Change Requests Updated Change Request Log Updated Project Schedule Updated Project Plans and Documents as needed Updated Project Status Reports