NASCIO 2015 State IT Recognition Awards

California Department of Technology

Project Academy Series

Category:

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Executive Summary

One of the six goals in the California Information Technology Strategic Plan is to develop a capable IT workforce. The National Association of Chief Information Officers recently published their report entitled "State IT Workforce – Facing Reality with Innovation". The California Department of Technology's Project Academy Series illustrates a unique approach to better educate the workforce on project disciplines to meet and exceed the State's goal and in conjunction with industry research on state government workforce needs.

California has had its share of challenges on mega, multiyear projects that have not gone as planned. Project failures or delays result in constituents not getting the services they deserve, higher overall costs, and increased public scrutiny. Therefore, the Department of Technology had to develop a solution to better manage the State's IT projects.

The California Department of Technology (Department) performed a thorough review of troubled projects and found several issues within project disciplines that were reoccurring themes in troubled projects. These common themes for project failure were dubbed "The Dirty Dozen" of common project disciplines and action was taken to address the problem.

In October 2013, the Department launched an innovative educational program designed to improve the skills of technology project managers, teams, business area experts and executives who are responsible for delivering technology centric projects. Improvement was needed on administering projects that serve the constituents of California, as well as critical systems that are needed to operate core functions of state government. Thus, the Project Academy Series was created.

The Project Academy Series is part of a comprehensive effort to reform and improve IT project management to ensure stakeholders and all project personnel understand the critical components of administering, delivering and ensuring IT project success.

Project Academy Series classes are unique in that they are taught by leaders with practical experience specific to California who share their stories, , best practices and tactical information to more than 150 attendees each month. These experts volunteer time to share and educate the State's workforce on their project successes and failures specific to the subject area they are teaching.

To date, we have administered more than 33 Academy sessions for more than 2,400 attendees representing 66 unique California state departments. Our goal is to improve project delivery and the overall success of California business projects involving technology. By educating the State's workforce and sharing experiences, we are effectively preparing the current workforce to administer successful IT projects in the future.

Business Problem and Solution

Although California has enjoyed many successful multiyear projects, there continues to be a handful of high profile projects that experience issues so severe they risk being suspended or canceled. Several high profile IT projects have been delayed, suspended or canceled because of insurmountable issues. Canceling or suspending projects affects the citizens of California because constituents are unable to access the services that government is charged to provide. Delays, cost overruns, and project cancellations are harmful to the State and could potentially cost State taxpayers millions of dollars.

The Department reviewed troubled projects to determine the root causes of the problems. After analyzing project artifacts and conducting project staff interviews, a variety of project disciplines were identified as common themes for troubled projects. These common themes that plagued organizations and most commonly contributed to project failure were dubbed "The Dirty Dozen":

- Data conversion and migration
- Testing
- Governance
- Organization change management
- Requirements definition and management
- Schedule development and management
- Risk/issues identification and management
- Quality assurance/control
- Roll out planning
- Interface identification and deployment
- Contract management
- Architecture

Recognizing this list, the Department created a Project Academy series to better educate and train State project teams, project managers, business area experts and executives on the "dirty dozen" disciplines.

Based on the "dirty dozen", the Department began brainstorming a process on how to handle these issues. With budgets continuing to be tight and travel restrictions still in effect for State government, additional educational opportunities needed to be created.

The objective was to utilize the three "C's" - take California experts that have California experience on California projects and ask them to teach project teams on how to successfully manage and execute a project. In August 2013, the State CIO worked with the Department Deputy Director of the Office of Professional Development to develop this new program with a start date of October of 2013 that was taught by public sector California leaders. Thus, the Office of Professional Development was tasked with securing presenters for each of the project disciplines.

Executives in State government were chosen, approached and secured to volunteer and educate the State IT and business workforce on various disciplines where they had

practical experience. Leaders and CIOs from California's Franchise Tax Board, Department of Health Care Services, California Corrections and Rehabilitation and several deputy directors from the Department have participated in teaching these half-day sessions.

These sessions are unique because "instructors" "teach and tell" by utilizing their personal experiences with project successes and failures. The Project Academy Series provides candid insight from California's top IT officials to provide a combination of tactical information and anecdotal experience. This combination has proved to be a winning strategy that resonates with the workforce.

The first Academy session, "How to be a Great Sponsor," was held in October 2013 and was geared towards Project Directors and Sponsors and taught by the CIO of the California Franchise Tax Board, Cathy Cleek. The session immediately filled up, and it was recognized that the demand for this education quickly exceeded one half-day session offered monthly.   In November 2013, the Office of Professional Development began to schedule these sessions twice monthly to meet the high demand. Twenty months into this Academy, the sessions continually fill to capacity within a few hours of offering.

Additionally, with the exception of the "How to be a Great Sponsor," all sessions are videotaped and are available on our website for public viewing. Additionally, guidelines have been developed for all the speakers to enable consistent delivery across the Academy Series. Below are descriptions of some of the classes available in the Project Academy Series:

- **How to Be a Great Sponsor**-- Educates Executive Sponsors/Project Directors on what it means to be an Executive Project Sponsor, how to tell if a project is in trouble, and what questions to ask to determine a solution. The course also provides advice for those new to state government who are Executive Project Sponsors on large projects.
- **Understanding and Implementing Organizational Change Management**-- This course is designed to take a closer look at the tools and templates within IT Leadership Academy Organizational Change Management (OCM) Readiness Guide. Intended to educate Executives (CIOs, AIOs, Budget Officers, Program Directors), Business Office Managers, Program Managers, and Change Agents, the course defines OCM, describes the 5 Stages of Successful Change, and presents numerous OCM methods and implementation strategies.
- **Contact Management/Negotiation**-- Educates Contact Managers, Project Managers, AIOs, CIOs, and Project Sponsors in the essential components of a good contract. The course also addresses how to be a great contact manager, contact amendments, and lessons learned from a large project.
- **Business Process Re-Engineering (BPR)--** Educates Project Managers and their teams, AIOs, CIOs, and Business Analysts in how to successfully utilize BPR. The course discusses lessons learned from *not* investing in BPR, and essential strategies for convincing executives that BPR is a "must" prior to procurement. Students also receive a vendor's perspective for when BPR is not done well.

- **Project Risks & Issues**-- Educates CIOs, AIOs, Business Area Experts, Project Directors/Sponsors/Managers and their teams on the purpose and importance of project risk and issue management. Students gain familiarity with the processes and tools needed for managing risks and issues and are provided with many real world examples of common challenges in these areas and how to address them successfully.

Significance to the Improvements in the Operation of Government

Educating the California State workforce is part of the California Information Technology Strategic Plan – Goal 5: Developing a Capable IT Workforce. The Project Academy series, among other efforts, fully supports this goal.

With the State workforce being better educated in the disciplines of successful IT project management, coupled with high profile leaders sharing real life lessons learned, the Project Academy Series is an educational nuance. The goal of the Academy is to have better managed and successfully delivered IT projects in State government. This approach along with instructor-led training is a winning combination that solidifies IT project management best practices for the State of California.

By educating our workforce we increase the likelihood of successful outcomes for IT projects benefiting IT initiatives that serve the people of California. From government workforce perspective, we utilize State employees for training for a significant cost reduction. These Project Academy sessions are free to all state staff--an advantage to every taxpayer in California.

Benefits of the Project

The Project Academy Series has the following attributes:

- o The sessions are free to any State employee thereby freeing up departmental budgets for other initiatives.
- o The sessions are within 18 miles of the State Capital making travel costs insignificant.
- o The sessions are taught by executive-level public sector California subject-matter experts with direct knowledge in the project disciplines.
- o After 20 months into the Academy, the sessions continue to be "sold out" and waiting lists are created.
- o With the exception of the "How to be a Great Sponsor", all sessions are videotaped and Academy artifacts and videos are posted on the Department's website located at: http://www.cio.ca.gov/opd/project_academy.html
- o More than 2,400 State employees have taken classes through the Project Academy Series.
- o More than 66 departments have sent personnel to the Project Academy Series.
- o 33 instructor-led Academy sessions have been offered.
- o Sessions are now being repeated and they continue to be at capacity.
- o The average rating by attendees of the Project Academy Series is excellent or very good – 92% overall.

- o Evaluation forms for each session continually provide positive feedback:
    - o "Best thing the office has ever done"
    - o "Very information and give me knowledge to use on a current project."
    - o "Instructors knowledge of topic, real life case study. Loved the dirty dozen and explanations of how these items made it to this list."
    - o "Practical real-world experience clearly delivered. Very interesting actual project exercise."
    - o "The information was extremely valuable-very well presented. Liked the activities + that the concepts were also presented as applied to real life. Great templates!"
    - o "Excellent information presented in a way that makes it immediately usable."