

THE CALIFORNIA STATE UNIVERSITY
OFFICE OF THE CHANCELLOR



BAKERSFIELD

April 18, 2003

CHANNEL ISLANDS

CHICO

DOMINGUEZ HILLS

MEMORANDUM

FRESNO

TO: CSU Presidents

FULLERTON

FROM: Charles B. Reed
Chancellor

Charles B. Reed

HAYWARD

SUBJECT: Information Technology Project Management - Executive Order No: 862

HUMBOLDT

LONG BEACH

Attached is a copy of Executive Order No. 862, which addresses information technology project management.

LOS ANGELES

MARITIME ACADEMY

In accordance with the policy of the California State University, the campus president has the responsibility for implementing executive orders where applicable and for maintaining the campus repository and index for all executive orders.

MONTEREY BAY

NORTHRIDGE

Guidance or assistance on the implementation of this executive order should be directed to the Executive Vice Chancellor and Chief Financial Officer.

POMONA

SACRAMENTO

SAN BERNARDINO

CBR:BR:pd

SAN DIEGO

Attachment

SAN FRANCISCO

cc: Executive Staff, Office of the Chancellor
Assistant Vice Chancellor, Information Technology Services
Vice Presidents, Administration/Business Affairs
Executive Deans
Business Managers

SAN JOSE

SAN LUIS OBISPO

SAN MARCOS

SONOMA

STANISLAUS

Executive Order No. 862

**THE CALIFORNIA STATE UNIVERSITY
Office of the Chancellor
401 Golden Shore
Long Beach, California 90802-4275
(562) 951-4000**

Executive Order No.: 862
Title: Information Technology Project Management
Effective Date: April 18, 2003
Supersedes: No previous executive order

This executive order, issued pursuant to Sections 1 and 2 of the Standing Orders of the Board of Trustees of The California State University, establishes the process to be followed for information technology projects in the California State University.

I. Scope and Applicability

An Information Technology Project (IT Project) subject to this executive order is a procurement of information technology goods or services that is neither routine nor reoccurring but:

- A. has an estimated cost for procurement and implementation which is \$500,000 or more, or
- B. comprises an activity that regardless of cost poses a high project risk or will have a high impact to the CSU.

II. Project Approval

Prior to undertaking an IT Project a feasibility study and a solicitation plan must be developed in accordance with the model Information Technology Project and

Procurement Planning Guidelines. These guidelines are located on the CSU Contract Resources Library website located at: <http://www.calstate.edu/csp/crl/crl.shtml#ref>. IT Projects so developed must receive the following approvals:

- A. The feasibility study must be reviewed and approved by the Executive Vice Chancellor and Chief Financial Officer.
- B. The solicitation plan must be reviewed and approved by the campus chief business officer.

III. Procurement

The procurement of information technology goods and services shall comply with the CSU Policy Manual for Contracting and Procurement. It is the policy of the CSU to employ fair and open competition to obtain the best value for the CSU. Evaluation and award of contract shall be based on objective and quantified evaluation criteria as expressed in the solicitation document.

IV. Implementation

Prior to project start date, an implementation plan must be filed with the Executive Vice Chancellor and Chief Financial Officer. The plan shall include the major project milestones, the project management structure, the criteria for completion and the completion date.

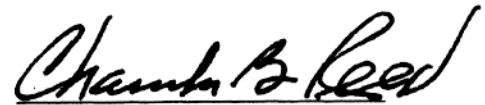
V. Review

Within the 60 days of project completion, as defined in the implementation plan, the campus shall maintain its first implementation review. This review should be made by someone not closely involved in the project yet possessing sufficient knowledge to grasp the project goals and outcome. The review shall include the following:

- whether the project achieved its stated goals;
- whether the project was completed in line with costs estimated in the feasibility study report, and if not, why not;
- the specific outcomes of the project, qualitatively and quantitatively;

Executive Order No. 862
Effective Date: April 18, 2003
Page Three

- whether the transition from project to ongoing operation has occurred successfully;
- the management process of the project;
- the need for subsequent actions and/or projects;
- the need for subsequent reviews of the project.



Charles B. Reed
Chancellor

Dated: April 18, 2003