NextGen PAL Stage 1a:
Revised Discovery & Planning Form

NextGen PAL is a proposed update to the California Department of Technology (CDT)'s Project Approval Lifecycle (PAL) process that oversees information technology (IT) projects at the State of California. NextGen PAL revises the current PAL process by proposing:

1. Low-overhead "discovery" and "prototype" phases;
2. A smaller process ("PAL Lite") for smaller projects; and
3. Caps on the overall size of all projects.

To implement NextGen PAL, this project recommends updating several stages of the current PAL process, including the Stage 1: Business Analysis form. This document details proposed revisions to the Stage 1: Business Analysis form as part of a new sub-stage 1a: Discovery & Planning.

The CDT's current PAL process begins with Stage 1: Business Analysis. During this stage, project teams detail their project's business intent in a Microsoft Word form (downloadable here under the Section 19A expandable menu). While this form helps the CDT identify the business objectives for a project, it offers less clarity about why the project will help California residents from a user-centered perspective. To help the CDT better understand constituents' need for a given project, we recommend the below changes to the Business Analysis form. We propose that this revised form become the basis of a new Stage 1a: Discovery & Planning, followed by a new Stage 1b: Proof of Concept.

The table below summarizes proposed changes to the existing Business Analysis form. (See here for an example form with these changes.)

ORIGINAL PAL SECTION	NEW SEC. #	NEW NEXTGEN PAL FORM
1.2 Submittal Information		Project Approval Executive Transmittal Attachment → **REMOVED**

1.3 Business Sponsorship		Program Background and Context → **REDEFINED IN SECTION 1.5**
1.5 Business Program		[Most intensive section of form] Program Background and Context + Business Problem/Opportunity and Objectives Table → **RETITLED "Business Objectives"** • Now focuses on outcomes vs process • Now omits the Metric & Measurement Method as these specifications are overly prescriptive and not needed
1.6 Business Alignment		Business Problem/Opportunity and Objectives Table → **RELOCATED TO 1.5**
1.7 Project Management		**REDEFINED IN STAGE 3**
1.8 Criticality Assessment	**1.7**	**RETITLED TO Criticality / Risk** Business Complexity Score → **REFRAMED CALCULATION / PURPOSE** Noncompliance Issues → **SIMPLIFIED** • Removed / Addressed in Stage 3: Privacy Information Assessment
1.9 Funding	**1.8**	**INCREASED DETAIL** about PAL process funding
1.10 Reportability Assessment	**1.9**	Reportable Project Decision Tree → **SIMPLIFIED to main points**