



## Tech Executive Leadership Initiative

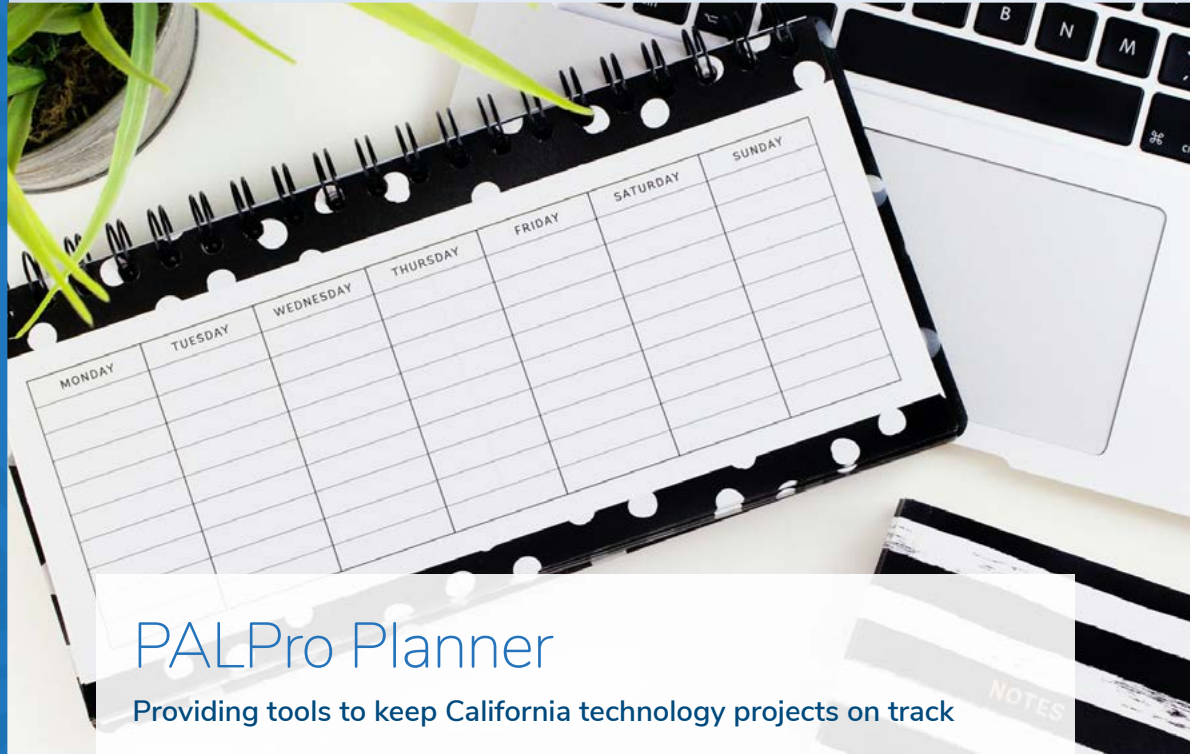
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## PALPro Planner

Providing tools to keep California technology projects on track

### BACKGROUND

*As part of their 10-week technology policy training program, the leaders of the Tech Executive Leadership Initiative spent 6 weeks working on real-world government challenges. Three teams tackled the question of how the State of California can improve its technology project approval and oversight process to better balance accountability with speed and delivery. Each team narrowed its focus to a specific part of the problem, conducted research, and developed solutions. Below is an overview of one team's solution: the PAL Pro Planner.*

### FOCUS

To get a State of California technology project off the ground, teams must not only get through the state's Project Approval Lifecycle (PAL) but also receive funding during the state's annual budget cycle. Both these processes are long and complex; projects take 14 months on average to go through the PAL cycle alone, often due to dropped tasks and approval delays. The budget cycle also has crucial, inflexible milestones. If a project team misses a deadline, it risks waiting a full year for its next funding opportunity. Helping teams align their PAL workflow to key budget deadlines is critical for efficient project development and delivery.

To learn more about this project, please visit [aspentechpolicyhub.com/teli](https://aspentechpolicyhub.com/teli).



## Tech Executive Leadership Initiative

### ABOUT TELI

This project was completed as part of the Tech Executive Leadership Initiative (TELI), a 10-week skills-building initiative that prepares experienced technology leaders to engage effectively with public sector challenges. Learn more at [aspentechpolicyhub.com/teli](https://aspentechpolicyhub.com/teli).

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## RECOMMENDATIONS

The California Department of Technology (CDT) should invest in a [PAL planning tool](#) to help project owners schedule deliverables around budget cycle deadlines and keep teams on track.

[The tool](#) should include several key features:

- **An interactive schedule dashboard:** After answering high-level questions about their projects, the tool should provide project owners with a recommended (but adjustable) schedule, based on PAL requirements and budget cycle dates. The tool should push email or mobile notifications to remind project owners of scheduled deadlines.
- **A function for collaborative document editing:** To reduce document exchange overhead, team members should be able to collaborate on PAL documents within the tool with commenting and tagging capabilities.
- **A function for alerting team members and approvers of pending tasks:** When a team member or approver has not resolved their tagged tasks, notifications should direct them to actions that require their attention. Approvals should also be able to send feedback within the tool through comments and tags.

To implement this tool, the CDT should:

- Run a discovery sprint with key stakeholders to refine the product requirements outlined in this requirements document;
- Initiate a PAL process for this tool using this draft [Stage 1 Business Analysis](#) and [this pre-filled SIMM 4.5 Appendix C form](#);
- Launch a procurement challenge to source innovative solutions from vendors; and
- Pilot the tool with a diverse set of projects to ensure it is functional and scalable.