



Office of the President

# Memorandum

**Date:** December 18, 2014

**cc:** Cabinet  
Darwin Labordo  
Kathleen Prunty  
Jonna J. Lewis  
(all w/ attachments)

**To:** Dr. Steven N. Garcia  
Vice President for Administrative Affairs  
and Chief Financial Officer

John W. McGuthry  
Vice President and Chief Information Officer  
for Information Technology

**From:**

A handwritten signature in blue ink that reads "J. Michael Ortiz".

J. Michael Ortiz  
President

**Subject:** Delegation of Authority – EXECUTIVE ORDER NO. 862

Pursuant to Executive Order No. 862, I am delegating to the Vice President for Administrative Affairs, the authority to implement the provisions of said Executive Order and to the Vice President for Information Technology, the responsibility to exercise the provisions of said Executive Order subject to the conditions expressed therein. You may sub-delegate this authority as you see appropriate.

Authority

The Vice President for Administrative Affairs has the authority to review and approve the solicitation plan.

Responsibility

The Vice President for Information Technology is responsible for developing a feasibility study and a solicitation plan in accordance with the model Information Technology Project and Procurement Planning Guidelines. Upon approval and prior to project start date, the Vice President for Information Technology is responsible for an implementation plan and a first implementation review of the project completion.

(w/attachments)

THE CALIFORNIA STATE UNIVERSITY  
OFFICE OF THE CHANCELLOR



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MONTEREY BAY

NORTHRIDGE

POMONA

SACRAMENTO

SAN BERNARDINO

SAN DIEGO

SAN FRANCISCO

SAN JOSE

SAN LUIS OBISPO

SAN MARCOS

SONOMA

STANISLAUS

April 18, 2003

**MEMORANDUM**

**TO:** CSU Presidents

**FROM:** Charles B. Reed  
Chancellor

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

*Charles B. Reed*

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

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.

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

CBR:BR:pd

Attachment

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

**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;

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**Effective Date: April 18, 2003**  
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- 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**