

*California Automated Consortium Eligibility
System
C-IV Project*



**County Purchase SB-12-2017
San Bernardino County - Proactive Text Message
Notifications**



I. Overview:

Description of the Request:

Pursuant to Section 6.11 of the Amended and Restated Revised System Agreement between the California Automated Consortium Eligibility System ("Consortium") and Accenture LLP and Proquire, LLC, with an effective date of June 29, 2007 (as amended, the "Agreement"), the San Bernardino County Transitional Assistance Department ("County") would like to implement an enhancement for "Proactive Texting" for the C-IV System's existing solution for text message notifications. This "Proactive Texting" enhancement would enable the C-IV System to create and send additional text message notifications that inform CalFresh customers of required case-related actions. These new text message notifications will provide additional outreach opportunities for CalFresh customers to maintain access to CalFresh benefits. The functionality deployed under this County Purchase will be available to the 39 Counties using the C-IV System. The County's request for the Proactive Texting enhancement requires one-time Services Charges, as further described in this County Purchase.

The scope of this County Purchase consists of the following:

- One-time Services Charges required for gathering requirements, designing, developing, testing and implementing the Proactive Texting enhancement. This enhancement would enable the C-IV System to send the following additional outbound text message notifications to customers:
 - Reminders of certain verifications due (e.g. VER 100);
 - Notifications that certain reporting forms have been received, processed, or are incomplete. Reporting forms include SAR 7, SAR 72, SAR 73 CalFresh RE, and CalWORKs/CalFresh RE;
 - Notifications that certain reporting forms have been processed and the benefit amounts associated to the processed forms. Reporting forms include SAR 7, SAR 72, SAR 73 CalFresh RE, and CalWORKs/CalFresh RE;
 - Notifications that required status reports (e.g. SAR 7) and redetermination/recertification forms (e.g. CW/CF RE) have been mailed to the customer;



The schedule for gathering requirements, designing, developing, testing and implementing the Proactive Texting enhancement would commence in December 2017 and complete by June 2018. Table 1.0 below describes the Services that Accenture will perform pursuant to this County Purchase.

Table 1.0

Task	Description
Design	<ul style="list-style-type: none">• Gather requirements, overall general and technical design, including development of System Change Requests ("SCRs"), and review and approval of SCRs via Change Control Board process;
Correspondence	<ul style="list-style-type: none">• Create up to nine (9) new batch jobs to support new Proactive Texting enhancement.• Resolve defects confirmed during system testing.
Online	<ul style="list-style-type: none">• Create one (1) new page on C4Yourself.com to host a San Bernardino County-provided video describing the process for completing a SAR 7 status report form.• Resolve defects confirmed during system testing.
Reports	<ul style="list-style-type: none">• Create one (1) report that provides a summary of the text message notifications sent.• Resolve defects confirmed during system testing.
System Test	<ul style="list-style-type: none">• Develop system test documentation, execute system testing and confirm defects.
Management	<ul style="list-style-type: none">• Hours required for managing the enhancement process from concept/design through implementation.
PMO Support	<ul style="list-style-type: none">• Hours required for project management support for the duration of the Change Order, including staff management, work plan management and financial management.



The County will be responsible for several milestones to enable the implementation schedule for the Proactive Texting enhancement. These milestones are listed in Table 2.0 below.

Table 2.0 – County Milestones

#	Milestones for Which County is Responsible	Date
1	Provide approved County Purchase and approved APD	12/20/2017
2	Approve planned text message notifications	12/22/2017
3	Provide final instructional video for completing SAR 7 status report	12/22/2017
4	Provide final Spanish translations for text message notifications	12/22/2017

Assumptions:

General Assumptions:

- The County must approve this County Purchase and provide the corresponding approved Advance Planning Document (“APD”) by December 20, 2017. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.
- The Total Cost in Section III below (“County Purchase Price”) is based on the scope of the work outlined in this County Purchase. Any revisions to scope may result in additional Services, Hardware, Software, and Production Operations Charges and would be executed as a revision to this County Purchase.
- The scope of work defined in this County Purchase will be executed under System Change Requests (“SCRs”) that will be approved by the Change Control Board. All designs and SCRs will be designed by and subject to the acceptance of the appropriate committee or workgroup.
- SCRs will move through the development lifecycle, following the standard release management process as documented in Volume VI of the C-IV System Operations and Support Plan (“SOSP”).
- All SCRs will be implemented in the System by production release 18.05, unless otherwise mutually agreed in writing.
- Status of the project schedule will be available to the County upon request.
- One-time Services Charges for Contractor to design, develop, test and implement the enhancement for Proactive Texting will be invoiced as payment milestones per the schedule set forth in Section IV of this County Purchase.
- This County Purchase does not include monthly recurring Production Operations Charges for the Proactive Texting enhancement, including charges related to the administration of the monthly volumes of outbound and inbound text messages,



operator look-up of applicants' phone numbers, and carrier messaging traffic. These recurring Production Operations Charges will be funded via the C-IV Project's Maintenance and Operations Budget, pending the availability of funds. In the event that funding is not available within the C-IV Project's Maintenance and Operations Budget, a revision to this County Purchase will be required to include those ongoing Production Operations Charges.

- The County Purchase Price does not include any changes to the functionality for Proactive Texting following implementation of the enhancement. Any requested changes to the functionality will require a revision to this County Purchase or follow the Consortium's existing prioritization process for C-IV System Change Requests.

Gather Requirements, Design, Test and Deployment Assumptions:

- The County will be responsible for reviewing and approving the requirements for the Proactive Texting enhancement for County Milestone #2. Please see Table 2.0 - County Milestones in Section I of the County Purchase for due dates.
- The enhancement for Proactive Texting will support English and Spanish languages only.
 - The County will be responsible for providing the final Spanish translations to the Contractor for County Milestone #4. Please see Table 2.0 - County Milestones in Section I of the County Purchase for due dates.
 - Contractor will not be responsible for verifying the accuracy of the County-provided translations.
- Development and testing estimates do not include User Acceptance Testing or Independent Testing.
- This County Purchase does not include the purchase of any mobile devices for system testing.
- The County will fully own the effort around job training, change management, communication and definition/testing of the new business model, roles and responsibilities, and new processes to support the enhancement for Proactive Texting.

Assumptions Regarding Text Message Notifications:

- The enhancement for Proactive Texting will leverage the C-IV System's existing text message notifications solution, including the short code for that solution. Therefore, the County Purchase Price does not include any recurring Production Operations Charges related to the administration and set-up of messaging services, administration of a new random short code, nor administration of the monthly text messaging service. In the event that the Consortium decommissions its existing solution for text message notifications, the County will be responsible for funding these monthly recurring Production Operations Charges. These additional charges would require a revision to this County Purchase.
- Text message notifications for the Proactive Texting enhancement will support the following carriers: AT&T, Cricket, Metro PCS, Sprint/Boost/Virgin, Verizon, T-Mobile and U.S. Cellular.



- The enhancement for Proactive Texting will support Short Message Service (“SMS”) messages only; Multimedia Messaging Service (“MMS”) messages will not be supported.
- The enhancement for Proactive Texting will support up to a maximum of ten (10) SMS messages per second.
- Text message notifications will be sent to customers’ mobile phone devices. Customers will be responsible for all charges from their mobile service providers resulting from receiving and responding to SMS messages sent by the C-IV System.
- Text message replies to customers’ inbound text messages to the C-IV System will not be sent to customers in real time, but will be dependent upon the batch scheduling of the C-IV System. The estimated time for the C-IV System to send a text message response to the customer is one (1) business day, with exception of any scheduled downtime for the C-IV System.
- Phone numbers outside of the 50 United States will not be supported.
- C-IV Service Level Agreements (“SLAs”) will not apply to the solution. Customers may not receive text message notifications sent via the C-IV System due to factors outside of the Consortium or Contractor’s control (e.g. failures caused by customer’s mobile phone hardware and software, customer’s mobile service provider, etc.).
- One (1) standardized report will be created as part of the Proactive Texting enhancement. The report will contain a summary of the text message notifications sent, categorized by the reason/purpose for the text message notification:
 - Reminders of certain verifications due (e.g. VER 100);
 - Notifications that certain reporting forms have been received, processed, or are incomplete. Reporting forms include SAR 7, SAR 72, SAR 73 CalFresh RE, and CalWORKs/CalFresh RE;
 - Notifications that required status reports (e.g. SAR 7) and redetermination/recertification forms (e.g. CW/CF RE) have been mailed to the customer;



II. Schedule:

The charges associated with this County Purchase will be incurred during State Fiscal Year 2017/18.

III. Total Cost:

The following table outlines the total charges for this County Purchase.

	SFY 2017/18	SFY 2018/19	SFY 2019/20	Total Charges
Services	\$290,112	\$0	\$0	\$290,112
One-Time Service Charges	\$290,112	\$0	\$0	\$290,112
Recurring Service Charges	\$0	\$0	\$0	\$0
Hardware and Software Charges	\$0	\$0	\$0	\$0
Hardware Charges	\$0	\$0	\$0	\$0
Hardware Maintenance and Support Charges	\$0	\$0	\$0	\$0
Software Charges	\$0	\$0	\$0	\$0
Software Maintenance and Support Charges	\$0	\$0	\$0	\$0
Production Operations Charges	\$0	\$0	\$0	\$0
One-Time Charges	\$0	\$0	\$0	\$0
Recurring Charges	\$0	\$0	\$0	\$0
Total Charges	\$290,112	\$0	\$0	\$290,112

IV. Milestone Schedule:

The following table outlines the charges and invoicing timelines for Payment Milestones associated with one-time Services.

Milestone Number	Description	Due Date	Milestone Price	SFY 2017/18	Total
1	Design Complete	2/16/2018	\$87,355	\$87,355	\$87,355
2	Build Complete	3/30/2018	\$130,550	\$130,550	\$130,550
3	System Test Complete	5/21/2018	\$72,207	\$72,207	\$72,207
	TOTAL		\$290,112	\$290,112	\$290,112



COUNTY PURCHASE APPROVAL

Subject: County Purchase - SB-12-2017

The subject document is accepted as allowing Accenture LLP to proceed with the subject County Purchase.

San Bernardino County - IT

By: [Signature]
Printed Name: Danny T. Hemen
Title: DD
Date: 11/21/17

San Bernardino County - Budget Authority

By: [Signature]
Printed Name: Roy Bean
Title: Admin. Supv. II
Date: 12/18/17

San Bernardino County - Purchasing

By: [Signature]
Printed Name: Leo Gomez, Supervising Buyer
Title: _____
Date: 12/19/17

Notice Address:
834 Hardt Street
San Bernardino, CA 92415

California Automated Consortium Eligibility System

By: [Signature]
Printed Name: Karen Berzonoth
Title: CalACES North Deputy Director
Date: 1/24/2018

Notice Address:
California Automated Consortium Eligibility System
Attention: _____
11290 Pyrites Way, Suite 150
Rancho Cordova, CA 95670-4481