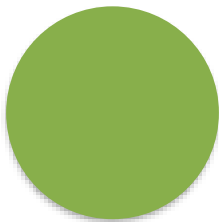


CalSAWS | JPA Board of Directors Meeting



December 4, 2020

# Agenda

1. Call Meeting to Order
2. Confirmation of Quorum and Agenda Review
3. Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

- All lines will be muted when meeting begins.
- To unmute:
  - ✦ When connected via computer – click the microphone icon.
  - ✦ When connected via telephone – press \*6.



# Action Items

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# Action Items

4. Approval of Agreement between the CalSAWS Consortium and Deloitte Consulting LLP for CalWIN Implementation Services.

# **THE CHALLENGE AND THE OPPORTUNITY**

**Guide** 18 Counties with 30,000 workers serving 5,200,000 program recipients across 800 office locations  
**to embrace transformative change**

# Stated Project Objectives

The project has noted 6 specific objectives associated with the CalWIN implementation support efforts

1. **Prepare the CalWIN Counties to transition** from using the CalWIN application and supporting business processes to using the CalSAWS application.
2. Ensure **each County's As-Is business processes are documented** and analyzed in order to prepare for changes from To-Be business processes resulting from adoption of the CalSAWS application.
3. Conduct a **county-specific As-Is and To-Be gap analysis** to create a foundation for OCM and communication with internal stakeholders including labor organizations and other County departments.
4. **Support county-specific business process change resulting from ancillary system choices.**
5. Ensure **county-specific Training** is developed to address changes in business processes.
6. Where possible, **leverage and adopt standard CalSAWS application Training** as the target for transition.

# Project Overview

Using an Agile Approach for Delivery: Discover, Define, Develop, Deliver & Iterate to Promote Adoption

**1** Business Process Reengineering

**2** Organizational Change Management

**3** Training

**4** Implementation & Conversion Support



## DISCOVER

Sets the stage through visioning sessions and baseline inventory of as is global and county-specific processes



## DEFINE

Analyzing the information from the Discover phase at the CalWIN and County levels



## DEVELOP

Generate ideas and prototype, build, and test customized change management and communications techniques and creative solutions with Counties and their staff



## DELIVER

Implement OCM and County Communication Plans, regularly assess change readiness, and use results to refine the approach and develop targeted action plans to address concerns

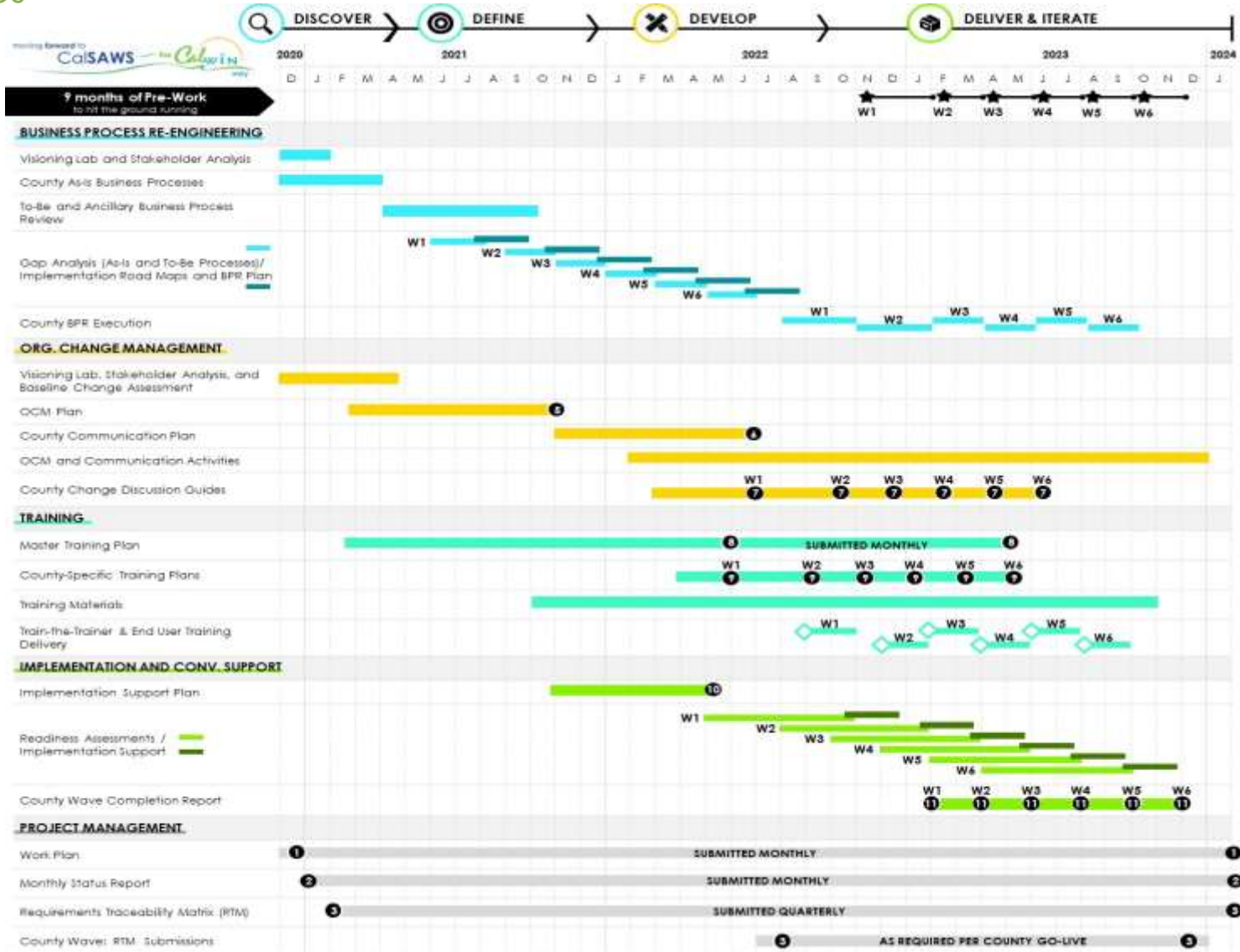


## ITERATE

Assess effectiveness of change management and communications programs, implement findings for continuous improvement, and repeat for subsequent implementation waves

# Project Schedule

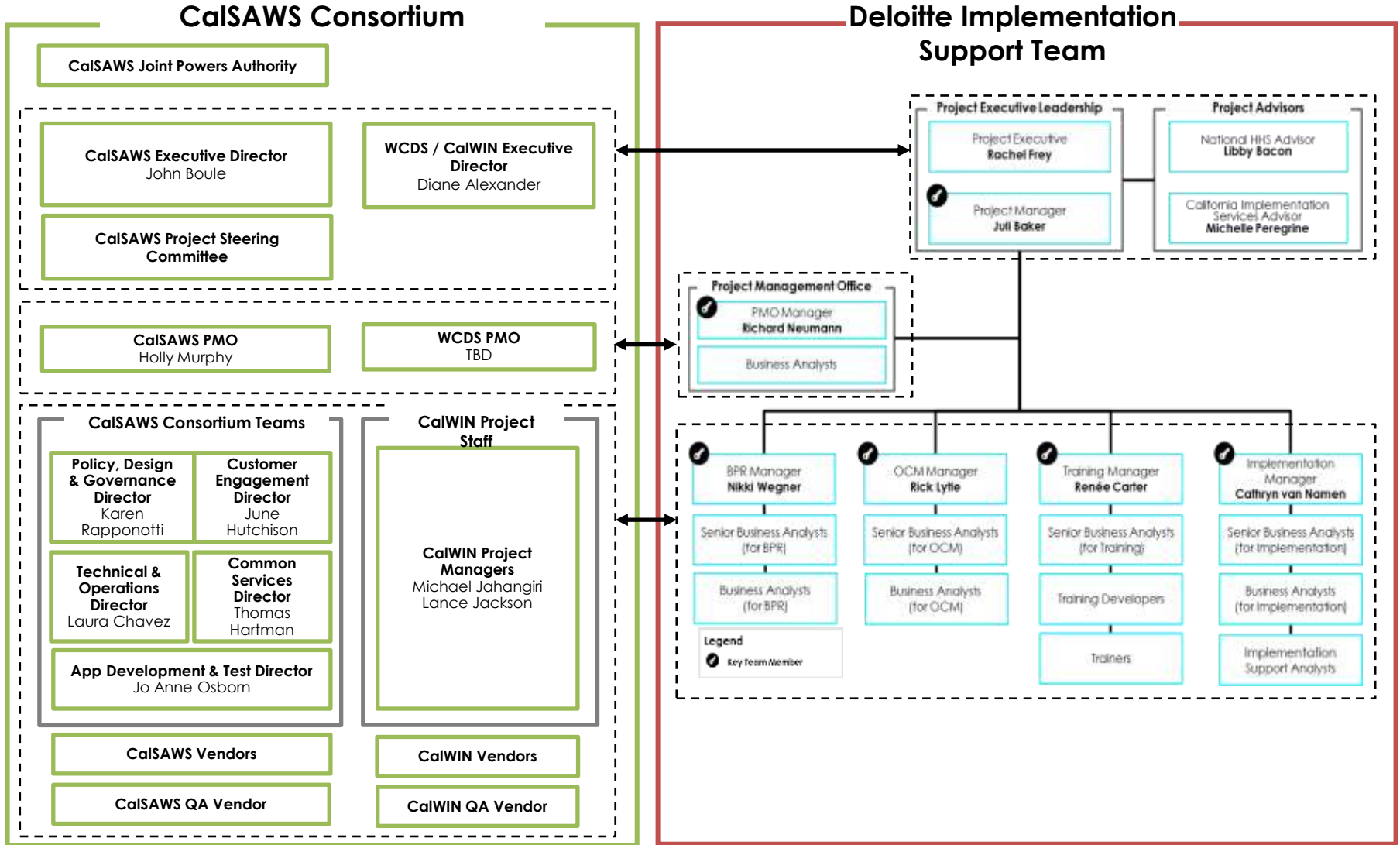
37-month overall timeline to transition 18 CalWIN counties to CalSAWS across 6 waves





# Working Together

An integrated team to support the CalWIN counties' journey to CalSAWS



# Action Items

4. Approval of Agreement between the CalSAWS Consortium and Deloitte Consulting LLP for CalWIN Implementation Services
5. Approval of Consent Items
  - a. Approval of the Minutes and review of the Action Items from the November 6, 2020 CalSAWS JPA Board of Directors meeting.
  - b. Approval of Accenture LRS/CalSAWS Change Notice 6, which includes requests for:
    - i. CalFresh Safe Drinking Water Pilot
    - ii. Homeless Assistance Automation
    - iii. Tech Architecture Support for Los Angeles County's Workforce Management (WFM) solution

Continues

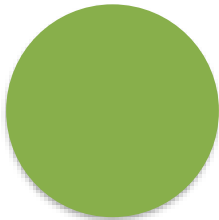
# Action Items

5. Consent Items (continued)
  - c. Approval of First Data LRS Change Notice 1, which includes requests for:
    - i. Child Care Provider Portal (Stage One Continuous Eligibility Program)
    - ii. CalFresh Safe Drinking Water Pilot
  - d. Approval of RGS Amendment 32, which includes requests for:
    - i. Annual update to cost of benefits and reconciliation of FTE counts
  
6. Approval of strategy for mitigation of BenefitsCal and CalSAWS Integration Schedule Risk.
  - Public Comment: Soft Launch Recommendation for BenefitsCal



## BenefitsCal & CalSAWS Integration Schedule Risk

- Public Comment: Soft Launch of BenefitsCal



# Portal Risk Mitigation Options

## Schedule Risk Statement



### Risk Statement

If either the BenefitsCal Phase 1 implementation or the CalSAWS modifications for BenefitsCal Phase 1 cannot be completed in time for the September 2021 go-live, the combined go-live of CalSAWS and BenefitsCal Phase 1 could be impacted.

# Portal Risk Mitigation Options

## Risk Options

### Option 1 – Temporary Bridge

Create a temporary interface from CalSAWS to C4Yourself to enable BenefitsCal Phase 1 development to continue beyond September 2021. All planned Phase 1 functionality would be deployed in one release in January 2022. Option 1 to be delivered as:

Release 1	January 2022	Phase 1
Release 2	April 2022	Phase 2
Release 3	July 2022	Phase 2

### Option 2 – Split Phase 1 Functionality into Two Releases

Scope BenefitsCal Phase 1, Release 1 to be equivalent to or exceed C4Yourself and deploy with the CalSAWS C-IV cutover in September 2021. Option 2 to be delivered as:

Release 1	September 2021	Phase 1
Release 2	November 2021	Phase 1
Release 3	April 2022	Phase 2
Release 4	July 2022	Phase 2

### Option 3 – Shift All Dates

Keep deployments for BenefitsCal Phase 1 and the CalSAWS C-IV cutover together and shift the go-live date. Option 3 to be delivered as:

Release 1	January 2022	Phase 1
Release 2	April 2022	Phase 2
Release 3	July 2022	Phase 2

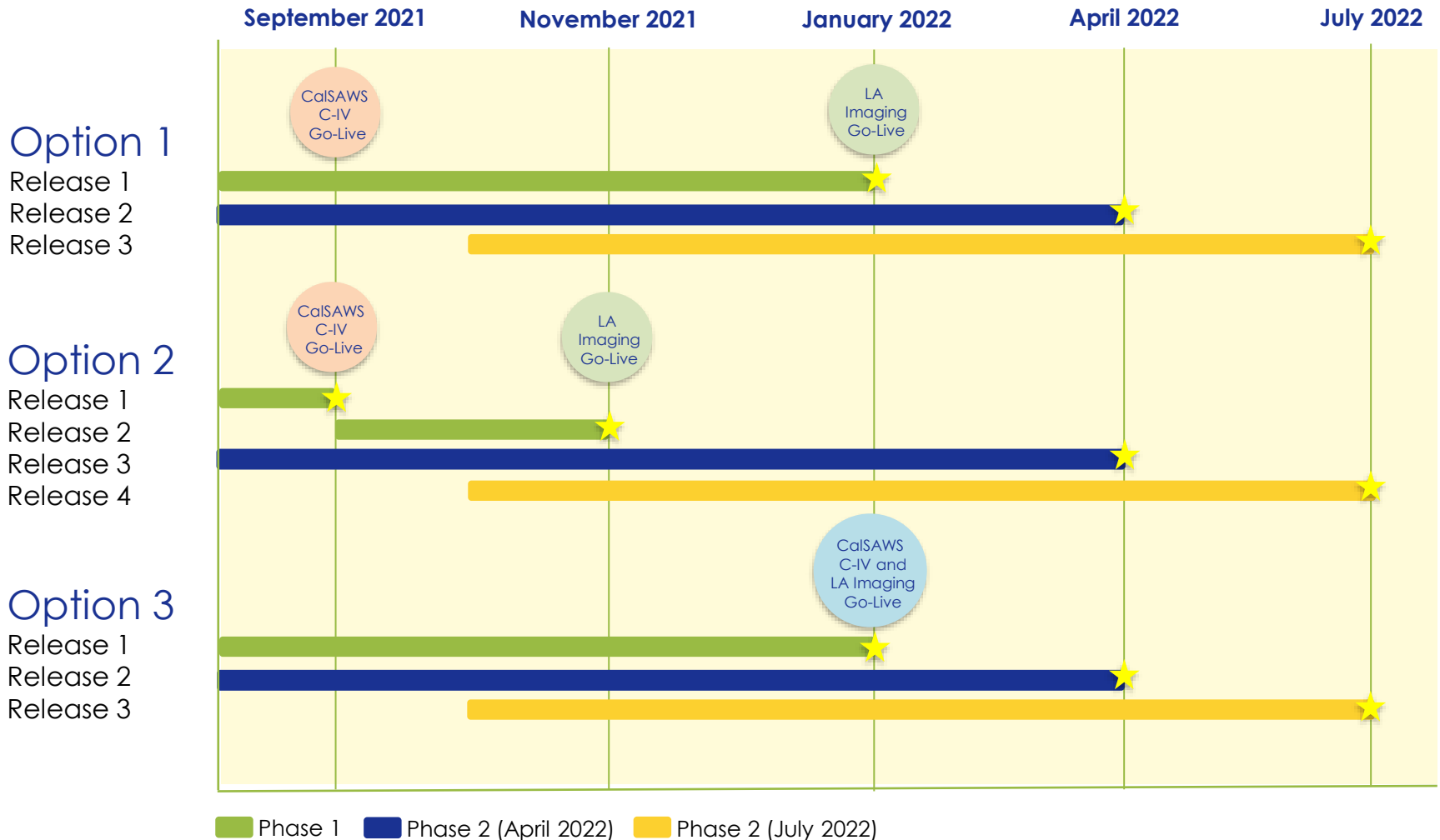
# Portal Risk Mitigation Options

## Schedule Guidelines/Considerations

- Prioritize C-IV System cutover to CalSAWS in September 2021
- Minimize workarounds and new processes
- Maximize available access channels
- Optimize level of effort to complete new and modified APIs
  - Option 1 – Bridge to C4Yourself includes development effort of temporary APIs as well as the development effort for the new BenefitsCal APIs
  - Option 2 – Includes development effort for the new BenefitsCal APIs
- Prioritize C4Yourself capabilities in first release of BenefitsCal
- Align options with the Los Angeles Electronic Document Management System (EDMS) cutover to the CalSAWS Imaging System
  - LA cannot go live on BenefitsCal without CalSAWS Imaging System
- Minimize implementation impact to customers and county staff during the 2021 holiday season

# Portal Risk Mitigation Options

## Risk Options - Timeline





# Portal Risk Mitigation Options

## Schedule Risk Options

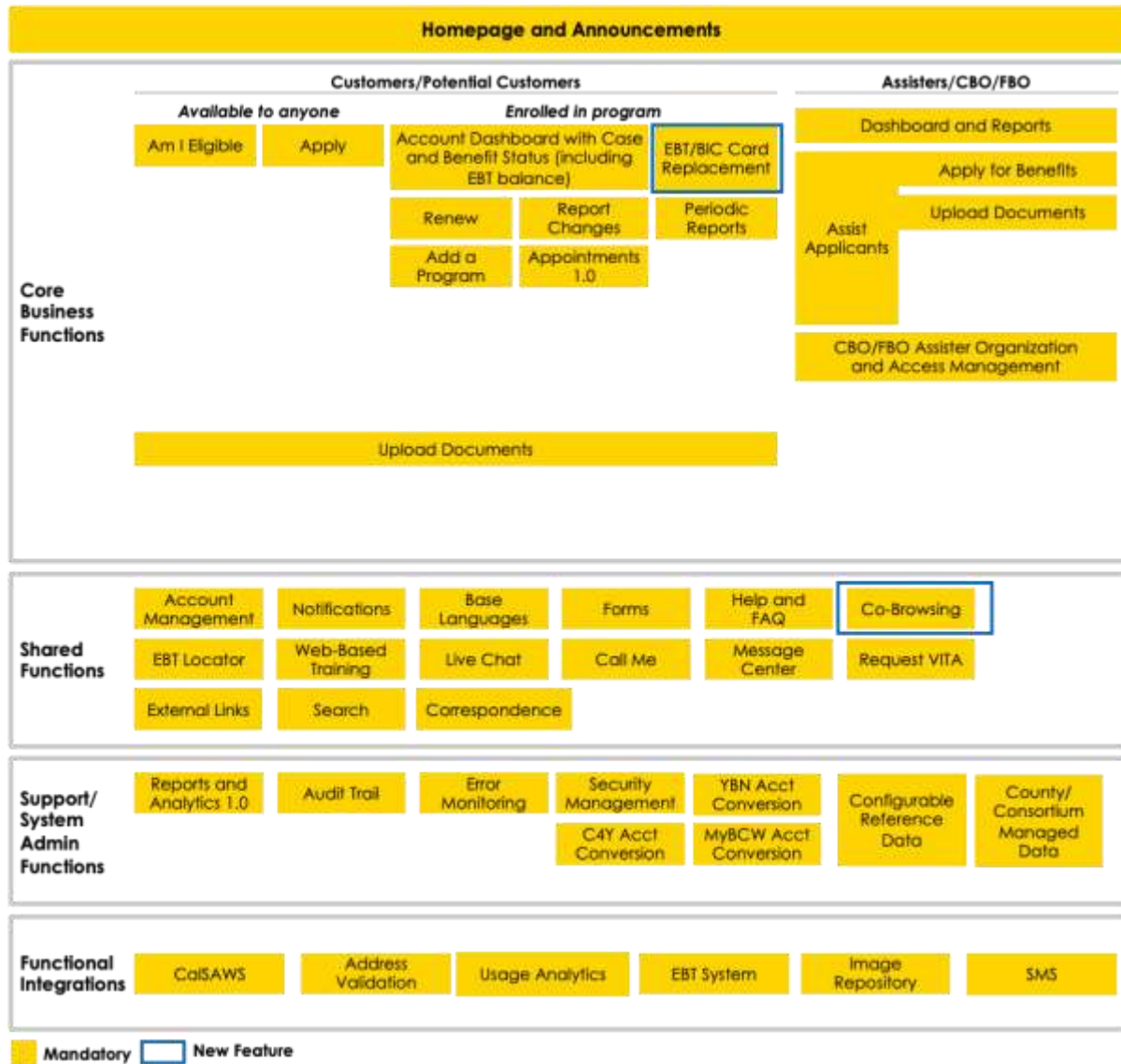
	Option 1 Temporary Bridge	Option 2 Split Phase 1 into 2 Releases	Option 3 Shift All Dates
<b>Description</b>	Create a temporary interface from CalSAWS to C4Yourself to enable BenefitsCal Phase 1 development to continue beyond September 2021. All planned Phase 1 functionality would be deployed in one release in January 2022.	Scope BenefitsCal Phase 1 (Release 1) to be equivalent to or exceed C4Yourself and deploy with the CalSAWS C-IV cutover in September 2021	Keep deployments for BenefitsCal Phase 1 and the CalSAWS C-IV cutover together and shift the go-live date
<b>Business/ Technical</b>	<ul style="list-style-type: none"> <li>• New APIs for bridge</li> <li>• Mods to CalSAWS batch</li> <li>• Secondary ANC workstream to build temporary bridge</li> <li>• Second Deloitte design/dev team to build R2 and R3</li> <li>• Two API deployments – temporary and permanent</li> </ul>	<ul style="list-style-type: none"> <li>• New and modified APIs</li> <li>• Design bifurcated</li> <li>• Improved performance due to pull vs. push batch functionality</li> </ul>	<ul style="list-style-type: none"> <li>• Impacts to when and how work is completed</li> <li>• Could impact future policy commitments</li> </ul>
<b>Implementation</b>	<ul style="list-style-type: none"> <li>• Single go-live for 40 counties</li> <li>• More time to prepare</li> <li>• Multiple UATs</li> <li>• LA loss of lessons learned</li> </ul>	<ul style="list-style-type: none"> <li>• Single CalSAWS and portal go-live for C-IV counties</li> <li>• All functions within 2 months</li> <li>• LA gets lessons learned</li> </ul>	<ul style="list-style-type: none"> <li>• Single go-live for 40 counties</li> <li>• Four-Delay in using CalSAWS</li> <li>• Impacts when and how work is completed</li> </ul>
<b>Customers</b>	<ul style="list-style-type: none"> <li>• All functionality at one time</li> <li>• Four-month delay in use of new portal</li> </ul>	<ul style="list-style-type: none"> <li>• Functionality in two releases</li> <li>• Existing access channels for Release 2 functionality</li> </ul>	<ul style="list-style-type: none"> <li>• All functionality at one time</li> <li>• Four-month delay in use of new portal</li> </ul>
<b>Schedule</b>	<ul style="list-style-type: none"> <li>• Release 1 – January 2022</li> <li>• Release 2 – April 2022</li> <li>• Release 3 – July 2022</li> </ul>	<ul style="list-style-type: none"> <li>• Release 1 – September 2021</li> <li>• Release 2 – November 2021</li> <li>• Release 3 – April 2022</li> <li>• Release 4 – July 2022</li> </ul>	<ul style="list-style-type: none"> <li>• Release 1 – January 2022</li> <li>• Release 2 – April 2022</li> <li>• Release 3 – July 2022</li> </ul>
<b>Cost</b>	• \$1.7M	• Negligible/absorbed	• \$15M+

# Portal Risk Mitigation Options

## BenefitsCal RFP Mandatory/Optional Features

### Mandatory Features

Original RFP Required Mandatory Features to be delivered

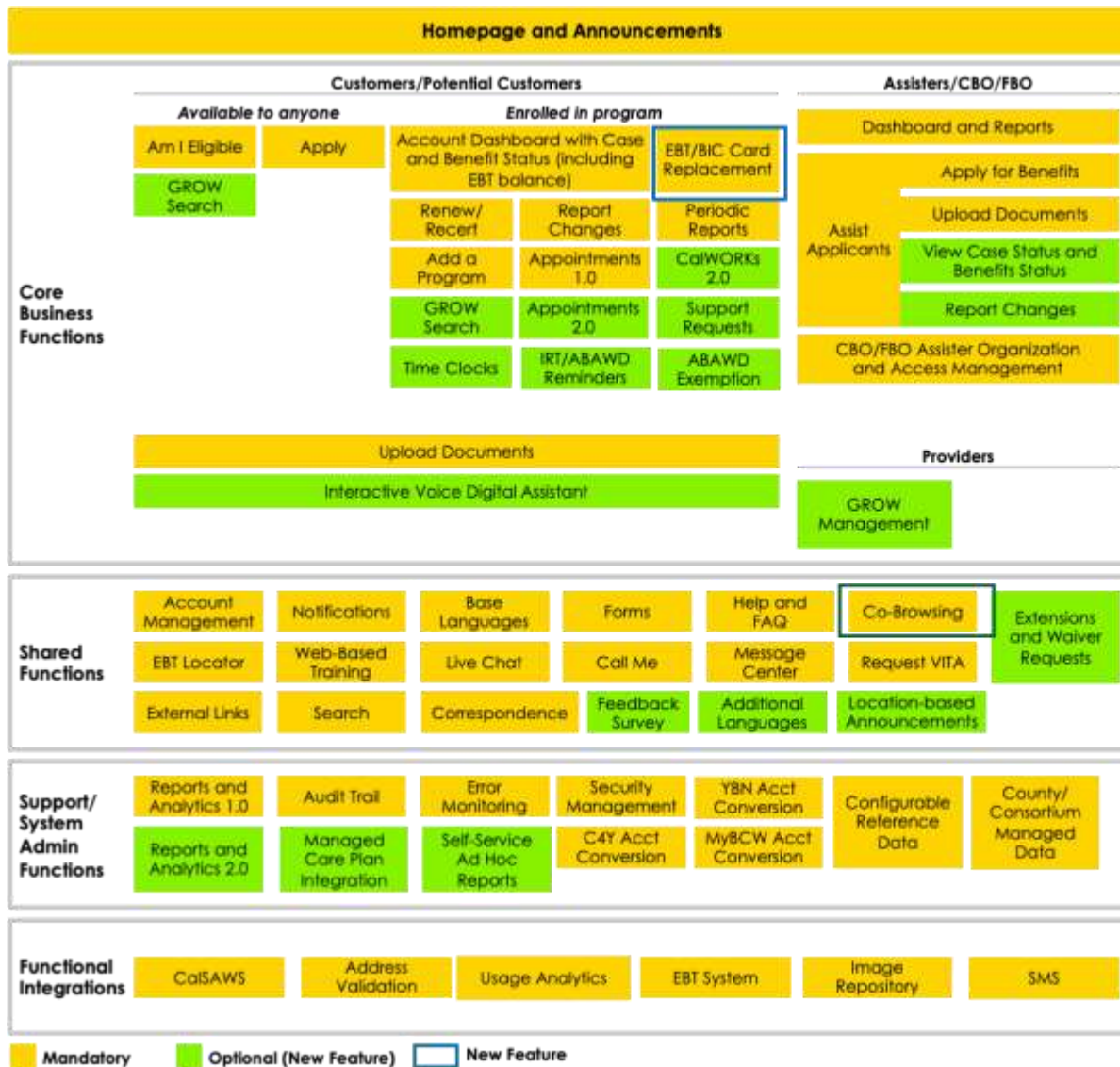


# Portal Risk Mitigation Options

## BenefitsCal RFP Mandatory/Optional Features

### Optional Features

Optional Features to be delivered with or after the Mandatory Features



# Portal Risk Mitigation Options

## Risk Options

### Option 1 – Temporary Bridge

Create a temporary interface from CalSAWS to C4Yourself to enable BenefitsCal Phase 1 development to continue beyond September 2021. All planned Phase 1 functionality would be deployed in one release in January 2022.

- Prioritizes the September 2021 deployment of CalSAWS for the C-IV Counties
- Four-month delay
- C4Yourself used until BenefitsCal deployed
- LA County will continue to use YBN and determine when it will transition to BenefitsCal Phase 1
- Temporary bridge for short-term use

#### Schedule

- Release 1 – January 2022 (avoids holidays)
- Release 2 – April 2022
- Release 3 – July 2022

#### Business/Technical

- New APIs for bridge
- Modification to CalSAWS batch
- Secondary workstream for Accenture to build temporary bridge while completing Release 1 build/deploy
- Second Deloitte design/development team to build Releases 2 and 3 while supporting Release 1
- Two API deployments – temporary and permanent

#### Implementation

- Single go-live BenefitsCal Release 1 event for 40 counties and customers
- More time for counties to prepare for new functionality
- Multiple UATs
- LA will not benefit from lessons learned

#### Customers

- Get all currently planned Release 1 functionality at one time
- Delayed use of new portal

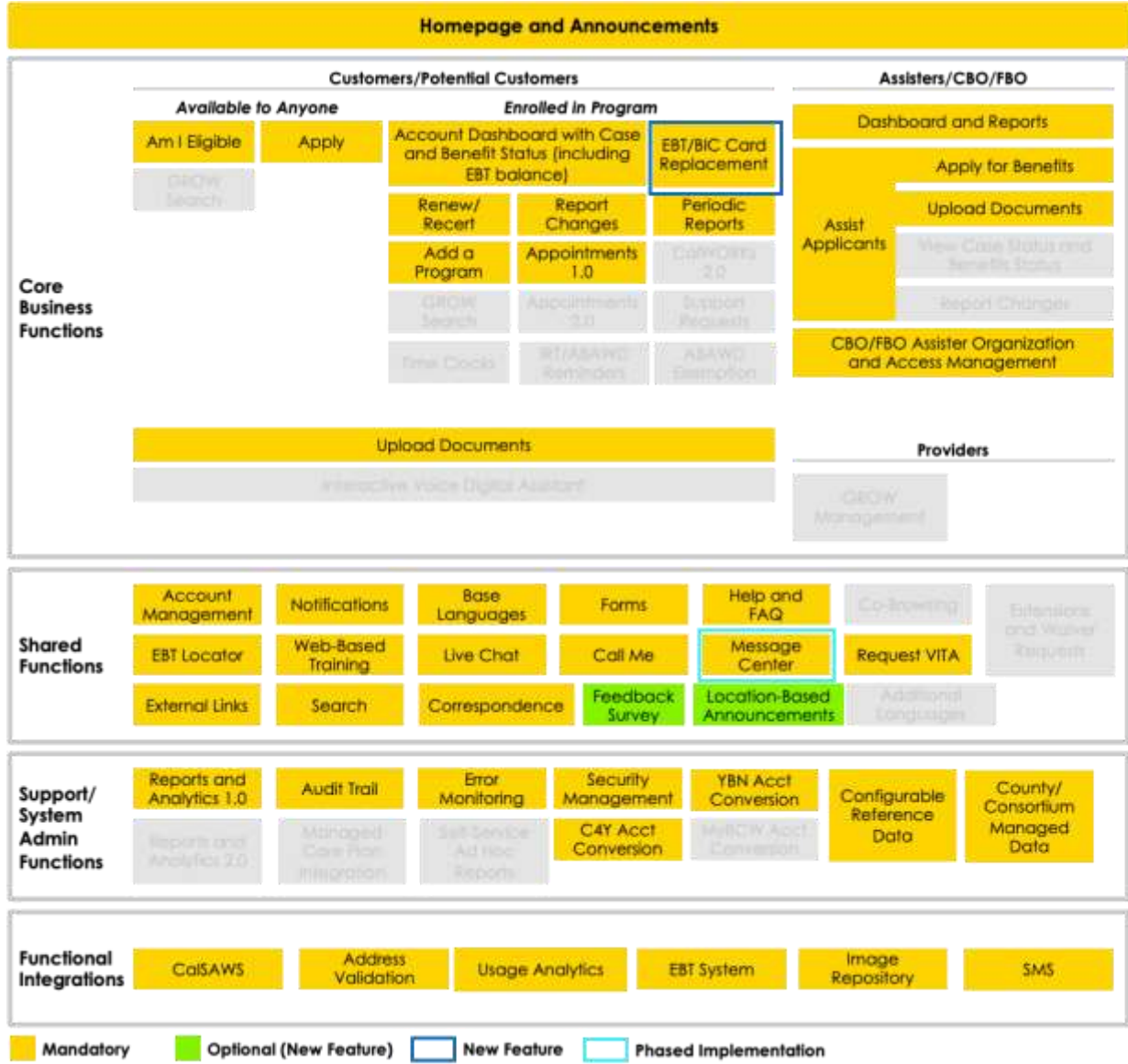
#### Cost / Resources

- \$700K in Accenture services / 4,300+ hours
- \$300K in software & AWS costs
- \$731K in Deloitte services / 5,760 hours

# Portal Risk Mitigation Options

## Option 1 Temporary Bridge

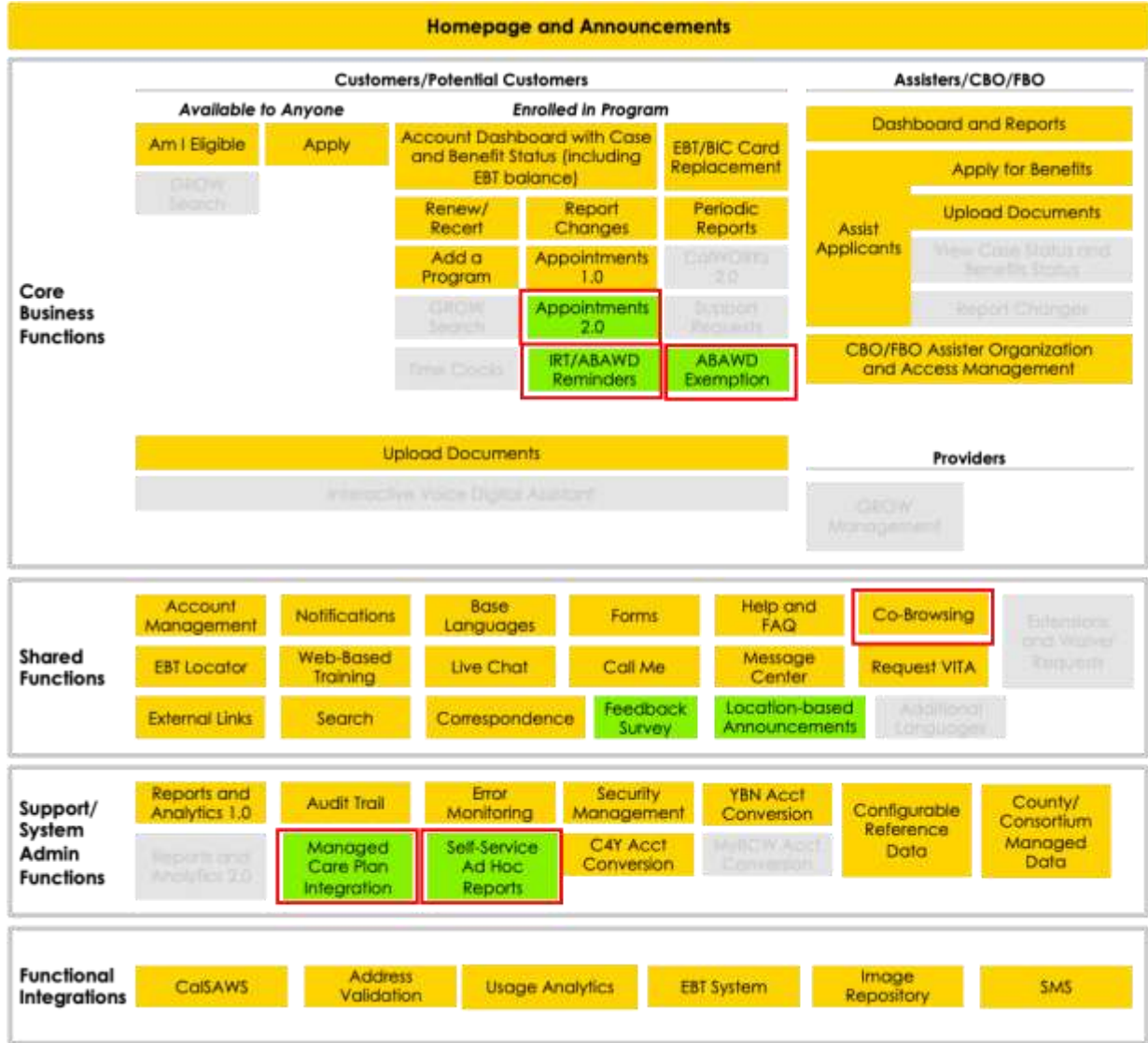
Jan 2022



# Portal Risk Mitigation Options

## Option 1 Temporary Bridge

Apr 2022

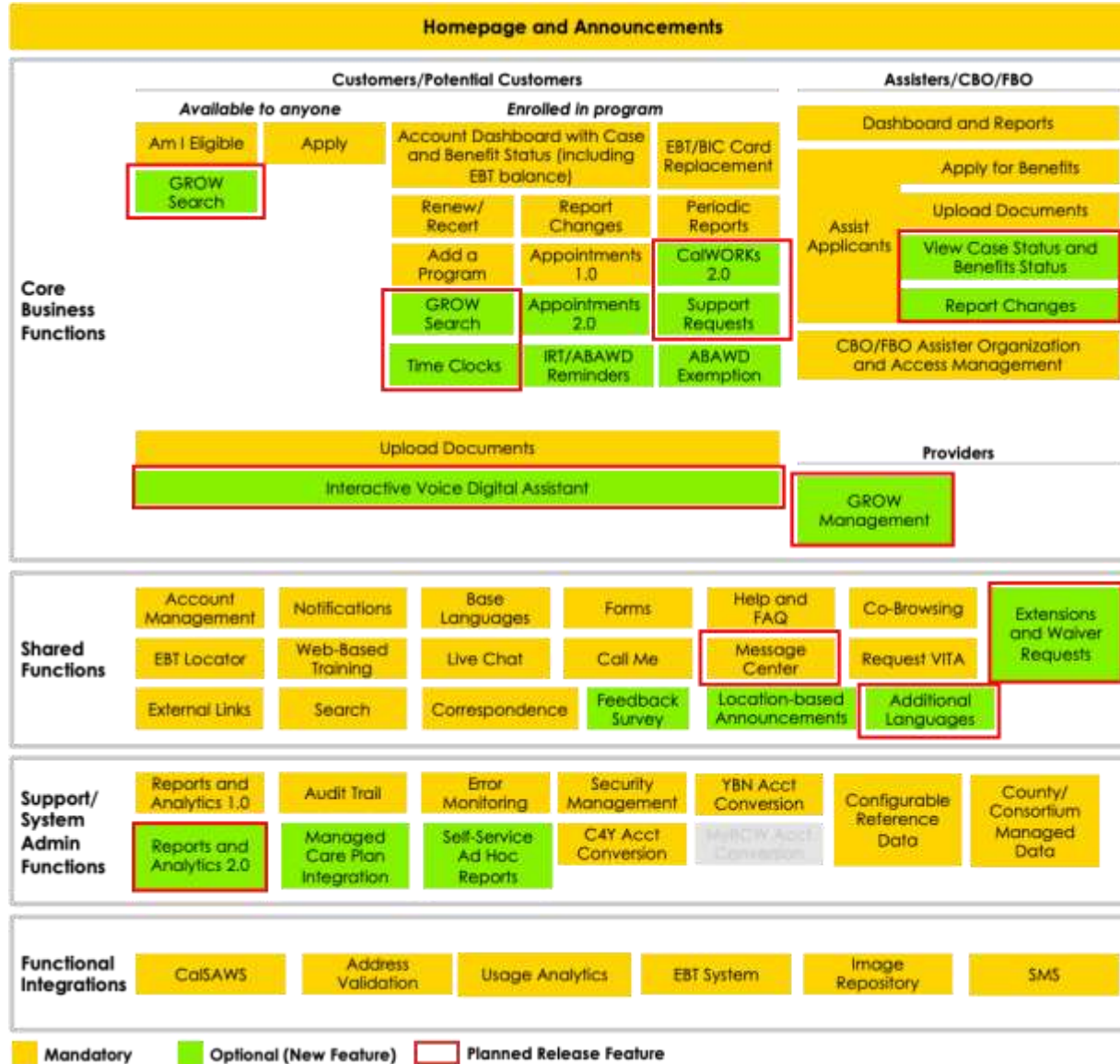


Mandatory
Optional (New Feature)
Planned Release Feature

# Portal Risk Mitigation Options

## Option 1 Temporary Bridge

Jul 2022



# Portal Risk Mitigation Options

## Risk Option 1: Bridge CalSAWS to C4Yourself Discussion

- Bridging to C4Yourself from CalSAWS was originally suggested by Accenture in Summer 2020 to decouple Portal/Mobile from September 2021 Cutover in order to reduce risk of delay to the Migration schedule.
- Reasons/benefits to build a temporary set of interfaces to C4Yourself:
  - Manage schedule risk
  - Allow additional time for BenefitsCal change management activities for counties and customers
- Risks of Bridging identified during analysis of this option:
  - Requires porting C4Yourself to the AWS Cloud as “temporary code” to avoid heterogeneous portal environments and extension of the C-IV data center
  - Requires extending software licensing for C4Yourself databases (~\$250K)
  - Requires over 4,000 hours to modify CalSAWS with temporary code in order to accommodate the legacy treatment of C4Yourself interfaces and batch imaging processes
  - Defers the Portal/Mobile deployment by four months due to resource constraints and holiday impact to customer implementation
    - New and improved customer experience is delayed
    - New and improved cloud-based technical platform is delayed



# Portal Risk Mitigation Options

## Risk Options

### Option 2 – Split Phase 1 into two Releases

Scope BenefitsCal Phase 1 to be equivalent to or exceed C4Yourself and deploy with the CalSAWS C-IV cutover in September 2021

- BenefitsCal Release 1 and C-IV CalSAWS go-live in September 2021
- 19 of 24 planned features available in September 2021
- BenefitsCal Release 2 goes live November 2021 to align with LA County imaging go-live

#### Schedule

- Release 1 – September 2021
- Release 2 – November 2021
- Release 2 – April 2022
- Release 3 – July 2022

#### Business/Technical

- New and modified APIs
- Design bifurcated
- Improved performance due to pull vs. push batch functionality

#### Implementation

- Single go-live BenefitsCal Release 1 event for C-IV County customers and counties
- LA benefits from lessons learned

#### Customers

- Get all currently planned Phase 1 functionality in two releases
- C4Yourself equivalent available with September 2021 go-live
- Existing access channels for Release 2 functionality

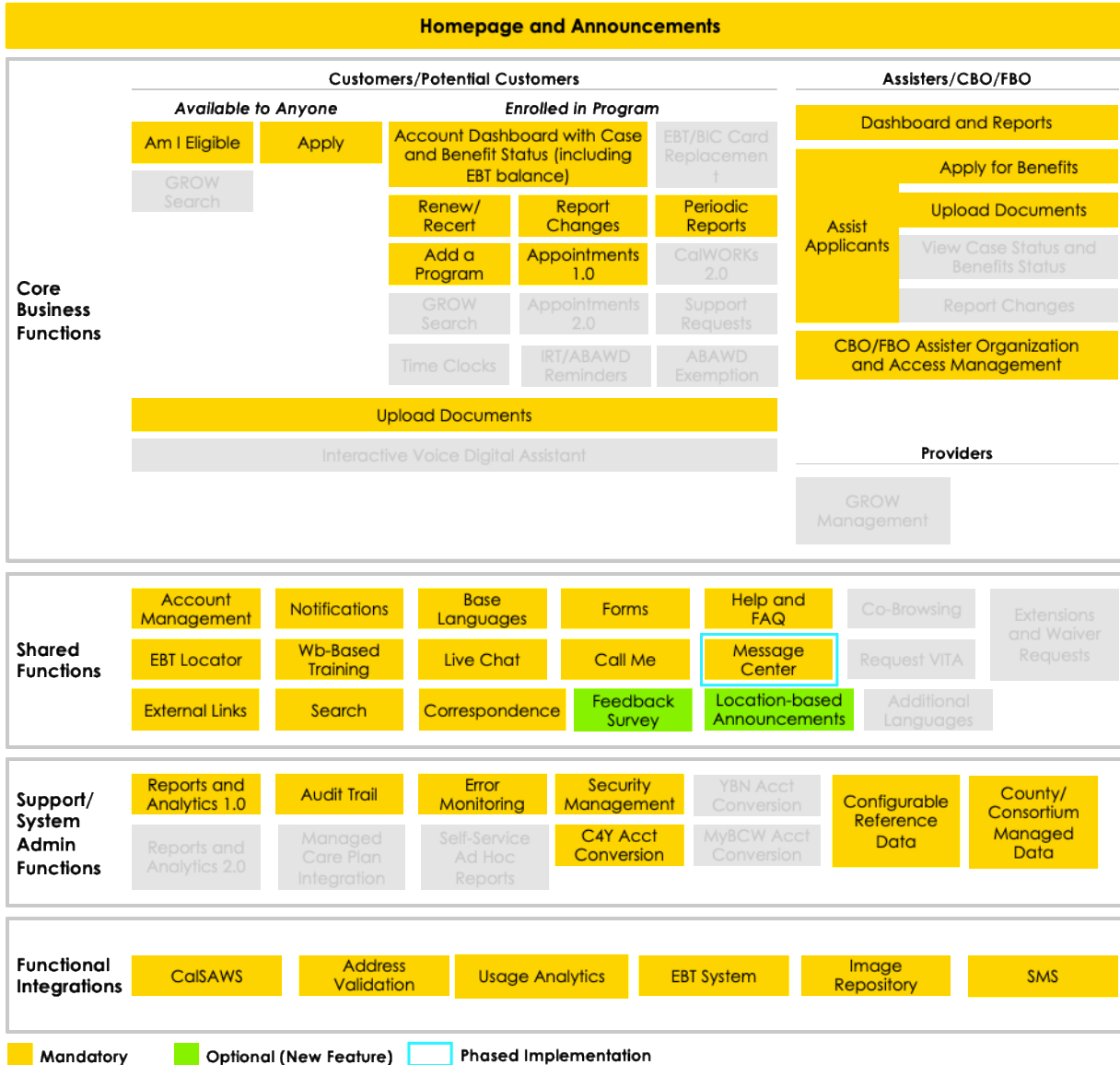
#### Cost / Resources

Negligible and will be absorbed by project

# Portal Risk Mitigation Options

**Option 2**  
Split Phase 1  
into 2  
Releases

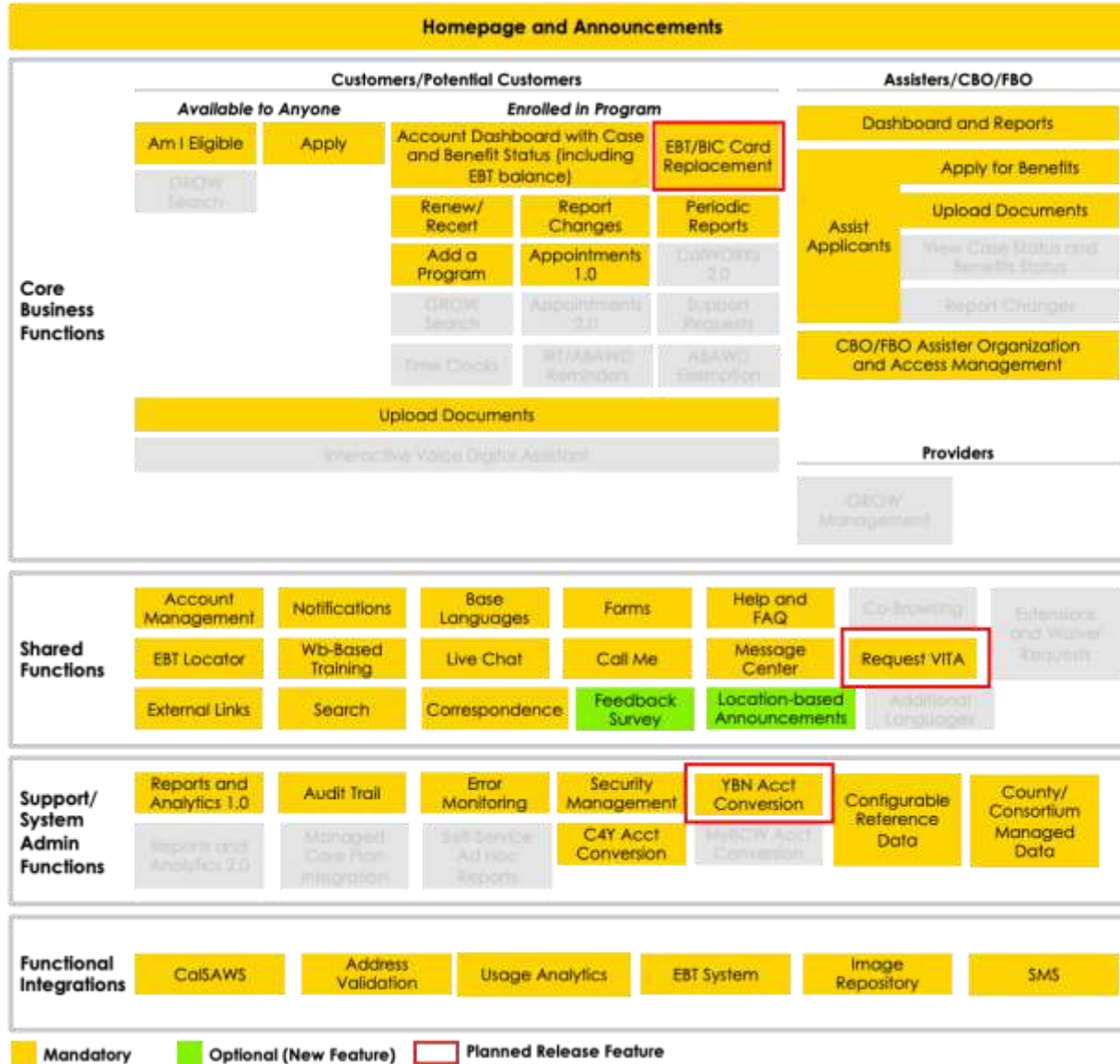
Sep 2021



# Portal Risk Mitigation Options

**Option 2**  
Split Phase 1  
into 2  
Releases

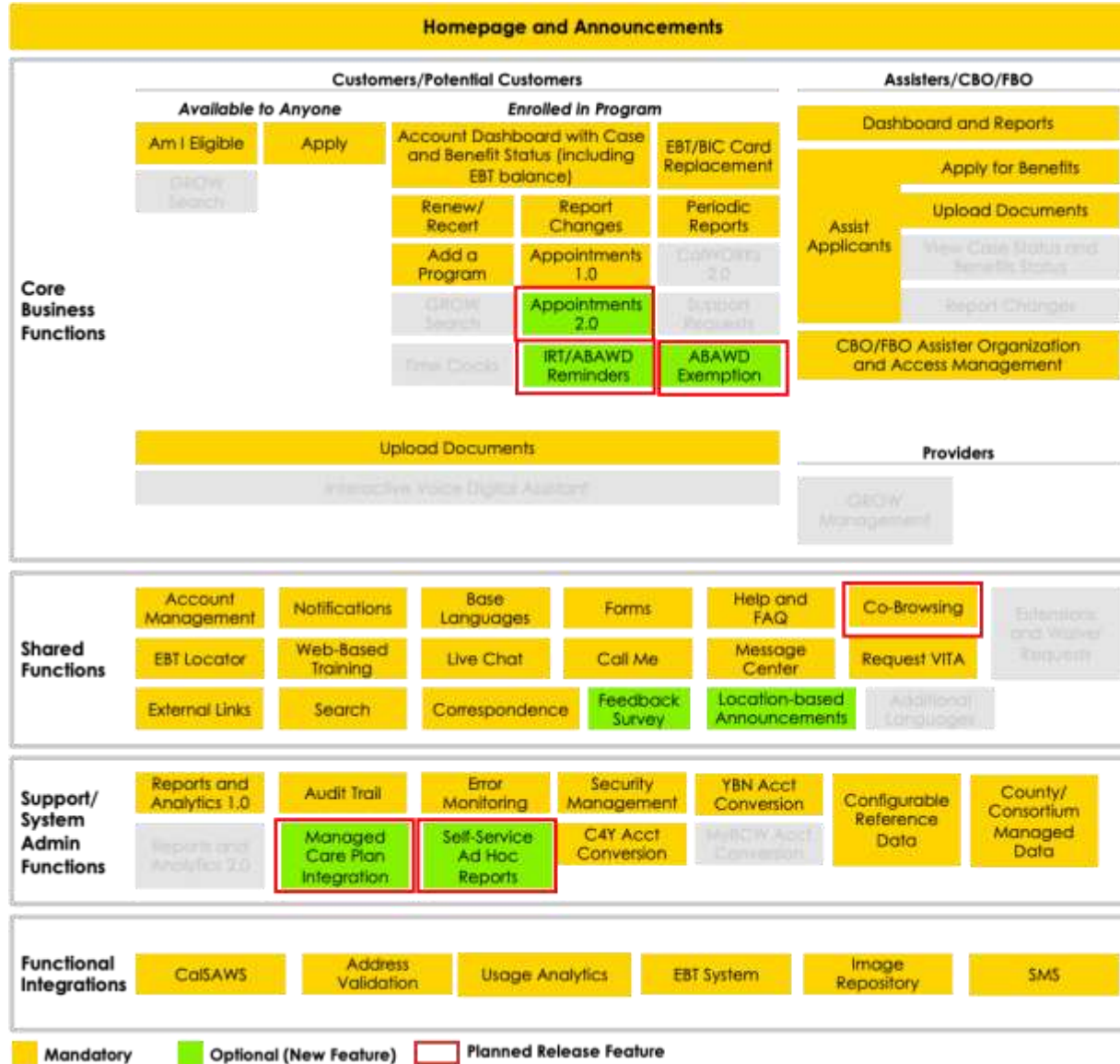
Nov 2021



# Portal Risk Mitigation Options

**Option 2**  
Split Phase 1  
into 2  
Releases

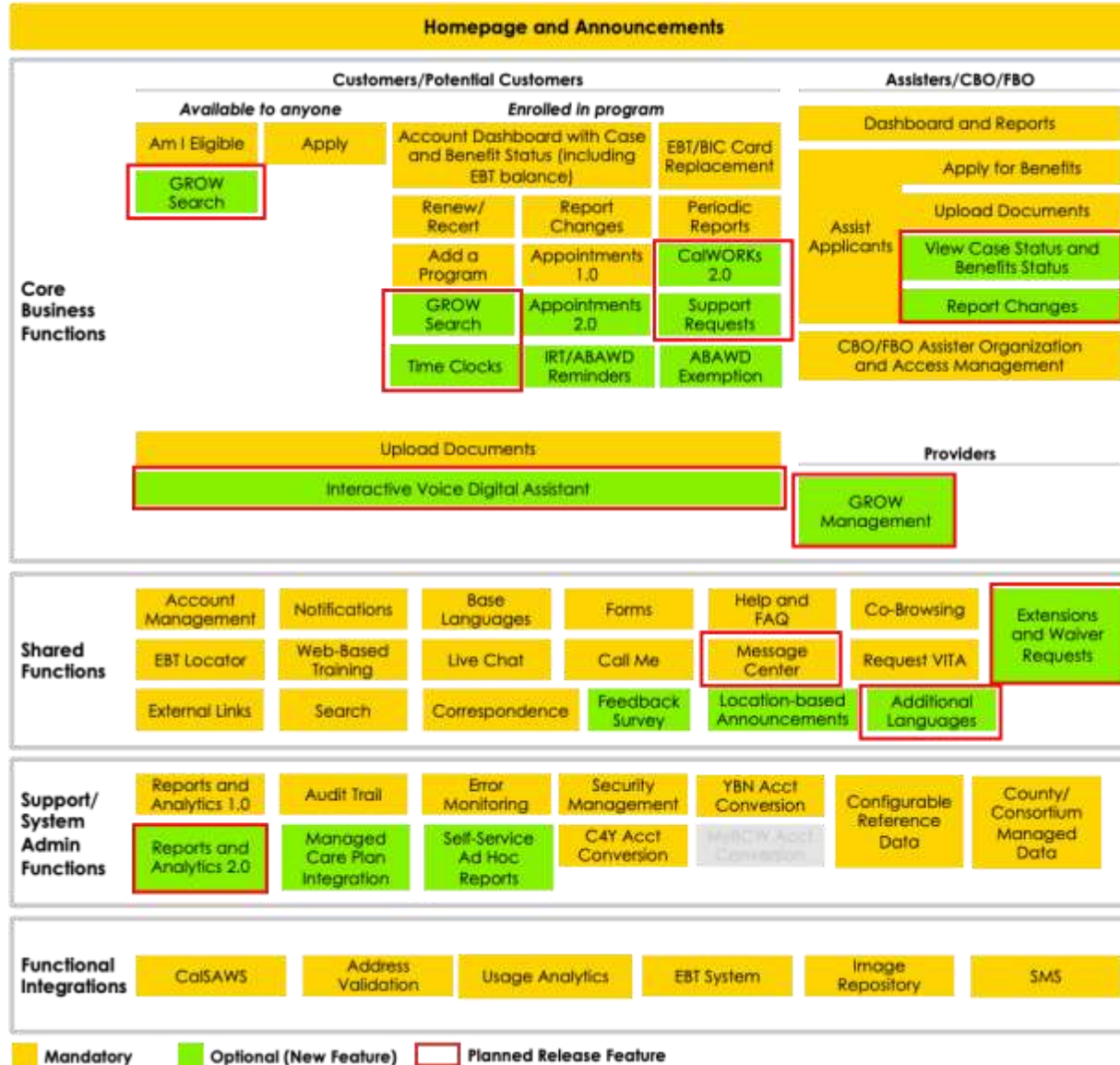
Apr 2022



# Portal Risk Mitigation Options

## Option 2 Split Phase 1 into 2 Releases

Jul 2022



# Portal Risk Mitigation Options

## Risk Options

### Option 3 – Shift All Dates

Keep deployments for BenefitsCal Phase 1 and the CalSAWS C-IV cutover together and shift the go-live date

- BenefitsCal Phase 1 for all 40 counties and C-IV go-live on CalSAWS occur together in January 2022 to align with LA County imaging go-live

#### Schedule

- Release 1 – January 2022 (avoids holidays)
- Release 2 – April 2022
- Release 3 – July 2022

#### Business/Technical

- Impacts to when and how work is completed
- Could impact future policy commitments

#### Implementation

- Single go-live of CalSAWS and BenefitsCal Phase 1 event for 40 counties and customers
- Impacts to when and how work is completed

#### Customers

- Get all currently planned Phase 1 functionality at once

#### Cost

\$15M+ depending on length of duration and negotiations to extend C-IV, C4Yourself, and complete additional, concurrent development work

# Portal Risk Mitigation Options

## Public Comment – Soft Launch

### Soft Launch Option

- Addresses a different risk → customer acceptance rather than delivery risk
- Cutover date risk around September 2021 is not relieved with a soft launch:
  - May be exacerbated because of the launch of BenefitsCal while C4Yourself is still being supported
  - Some Counties and transactions would have to be routed in a new way while the other C-IV counties are still on C4Yourself
- The customer acceptance risk is being addressed by several elements of the project plan:
  - User Centered Design
  - User Acceptance Testing
  - Enhanced Customer Communications
  - Change Management

# Portal Risk Mitigation Options

## Schedule Risk Options

	Option 1 Temporary Bridge	Option 2 Split Phase 1 into 2 Releases	Option 3 Shift All Dates
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<b>Cost</b>	<ul style="list-style-type: none"> <li>• \$1.7M</li> </ul>	<ul style="list-style-type: none"> <li>• Negligible/absorbed</li> </ul>	<ul style="list-style-type: none"> <li>• \$15M+</li> </ul>

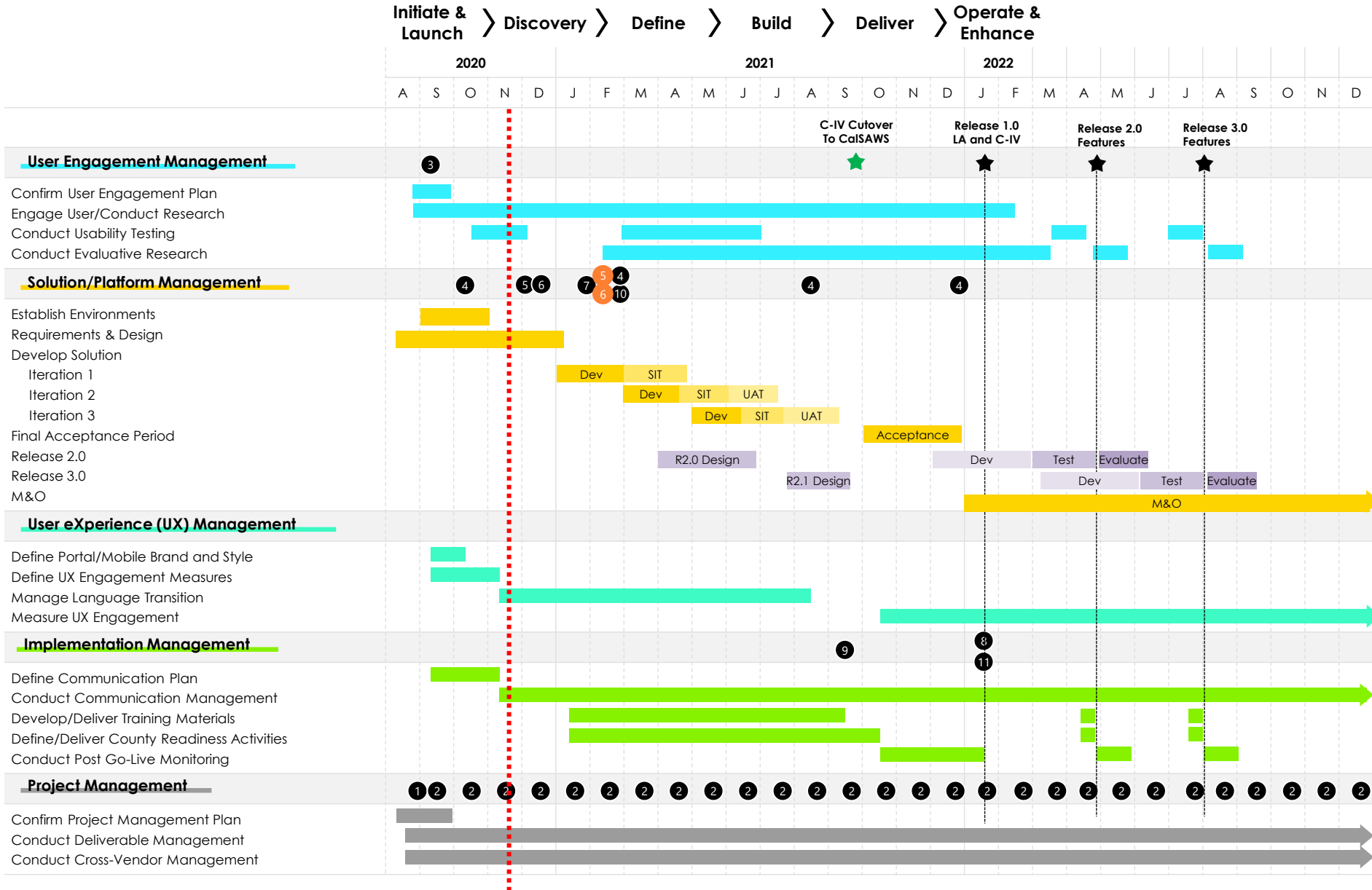




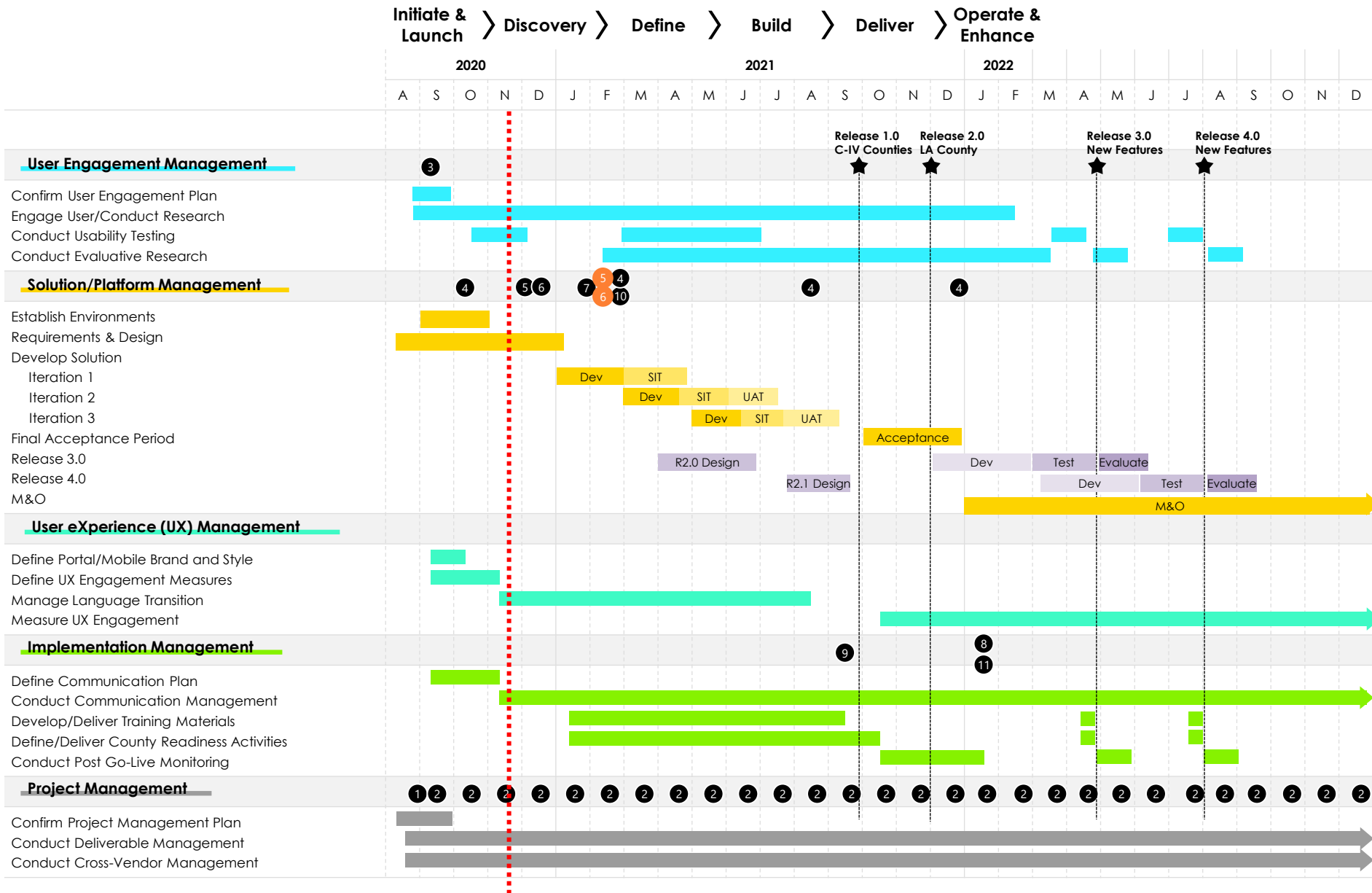
# **Risk for Portal Go-Live Dates Appendix**

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# Option 1 Timeline



# Option 2 Timeline



# Portal Risk Mitigation

## Risk Options – September 2021 or January 2022

The following features will be provided for the first release of the new BenefitsCal System in September 2021 (Option 2) or January 2022 (Options 1 and 3):

Features	Existing in C4Y?	C-IV Needs?	Original Release	CWD Process Impacts
<b>Apply for Benefits</b> Medi-Cal, CalFresh, and CalWORKs	Yes	Yes	1.0	No
<b>Report a Change</b> Address, Pregnancy, People Moving In/Out, Job Loss/Gain, Someone has Passed, Other	Yes	Yes	1.0	Yes
<b>Redeterminations/Renewals</b>	Yes	Yes	1.0	TBD
<b>Periodic Reports</b>	Yes	Yes	1.0	TBD
<b>Homepage and Dashboards</b>	Yes	Yes	1.0	No
<b>Alerts &amp; Notifications</b> System announcements, nudges for items due	Yes	Yes	1.0	No
<b>CBO/FBO</b> CBO Dashboards, application submission, document upload	Yes	Yes	1.0	No
<b>Account Management</b> Create an account, reset password, Multi-Factor Authentication	Yes	Yes	1.0	Yes
<b>Messages and Correspondence</b> One-way from County to Customer	Yes	Yes	1.0	No
<b>Document Upload</b>	Yes	Yes	1.0	Yes
<b>Appointments</b> Ability to request and cancel appts	No	No	1.0	Yes
<b> Screener: Am I Eligible</b> Medi-Cal, CalFresh, and CalWORKs	Yes	Yes	1.0	No

# Portal Risk Mitigation

## Risk Options – September 2021 or January 2022 (cont.)

The following features will be provided for the first release of the new BenefitsCal System in September 2021 (Option 2) or January 2022 (Options 1 and 3):

Features	Existing in C4Y?	LA Needs?	# Estimated APIs	Original Release	CWD Process Impacts
<b>Administrative Screens</b> Configuration of county preferences, maintaining help content	Yes	Yes	N/A	1.0	Yes
<b>Reports (Admins)</b> Operational reporting for usage	Yes	Yes		1.0	Yes
<b>Languages</b> Complete BenefitsCal portal including help, training materials and messaging/ documents generated by the portal 1. English 2. Spanish 3. Armenian 4. Cantonese (Chinese) 5. Hmong 6. Korean 7. Lao 8. Mandarin (Chinese) 9. Portuguese 10. Russian 11. Tagalog 12. Vietnamese	No	No	N/A	1.0	Yes
<b>Help Center</b>	Yes	Yes	N/A	1.0	No
<b>C4Y User Conversion</b>	N/A	Yes	N/A	1.0	Yes

# Portal Risk Mitigation

## Risk Options – November 2021 or January 2022

Five features are proposed to be released in November 2021 (Option 2) in alignment with the LA County imaging timeline or in January 2022 (Options 1 and 3):

Features	Existing in YBN?	LA Needs?	# of Estimated APIs	Original Release	CWD Process Impacts	Alternative Access Prior to Release
<b>YBN User Conversion</b>	N/A	Yes	N/A	1.0	Yes	N/A
<b>Support Request: VITA (Required for Jan 2022)</b>	Yes	Yes, VITA	1 Mod	1.0	Yes	Paper-based submission*
<b>Account At Risk</b> Ability for a customer to flag that their account may be at risk/may be compromised.	No	No	1 Mod	1.0	Yes	Customer calls County offices
<b>EBT and BIC Card Replacements</b> Requests generate a task for County staff to address.	No	No	1 Mod	1.0	Yes	Customer calls County offices
<b>GA/GR</b> General assistance/general relief application.	Yes	Yes	1 Mod	1.0	Yes	Continue to use C-IV (manual program)

\* Assumed to be current process

# Portal Risk Mitigation

## Risk Options – April 2022 Release

Three features are proposed to move to the April 2022 release from Release 1.0 with all other features scheduled for release as planned

Features	Existing in YBN or C4Y?	# of Estimated APIs	Original Release	CWD Process Impacts	Alternative Access Prior to Release
<b>Enhanced Appointments</b> Online scheduling based on available slots	No	2 New	1.0	Yes	Call CWD / use Release 1.0 Feature
<b>Co-Browsing (Screen sharing)</b>	No	TBD	1.0	Yes	LogRocket Record/ Playback
<b>IRT and ABAWD Reminders</b> Reminders to customers to report income and work information (income reporting threshold).	No	2 New	1.0	Yes	NOAs
<b>Self-Service Ad Hoc Reports</b> Within Qlik, admin users can create reports to evaluate Portal activity and data (apps, etc).	No	0	2.0	Yes	Request ad hoc reports to be generated

# Portal Risk Mitigation

## Risk Options – April 2022 Release *(cont.)*

Three features are proposed to move to the April 2022 release from Release 1.0 with all other features scheduled for release as planned

Features	Existing in YBN or C4Y?	# of Estimated APIs	Original Release	CWD Process Impacts	Alternative Access Prior to Release
<b>ABAWD Exemption Request</b> Customers answer a few questions to exempt from work requirements	No	TBD	2.0	Yes	Call CWD or submit paper request
<b>Managed Care</b> Sharing demographic data between the Portal and Medi-Cal managed care plans	No	1 New	2.0	Yes	From CalSAWS - MEDS



# Portal Risk Mitigation

## Risk Options – July 2022 Release

One partial feature is proposed to move to the July 2022 release from Release 1.0 with all other features scheduled for release as planned

Features	Existing in C4Y or YBN?	# of Estimated APIs	Original Release	CWD Process Impacts	Alternative Access Prior to Release
<b>Two-way Messaging</b> Customer-initiated messages to caseworkers (bi-directional)	No	2 New	1.0	Yes	Call CWD
<b>Amazon/Google Voice Service</b>	No	1 New	3.0	No	N/A
<b>GROW*</b> Resource databank, search for services or jobs, make appts.	No	TBD	3.0	Yes	Call CWD
<b>CalWORKS 2.0*</b> Customer-facing features to support OCAT.	No	TBD	3.0	Yes	Call CWD
<b>Support Requests</b> <ol style="list-style-type: none"> <li>1. CalFresh program participants to request medical expenses</li> <li>2. To request work registration exemptions</li> <li>3. Employment services participants can submit good cause reason WtW Form 27</li> <li>4. Employment services participants can submit a WtW Form 26 and 27</li> <li>5. WtW Form 8 for students</li> <li>6. WtW Form 31 to cure a sanction</li> </ol>	No	1 Mod	3.0	Yes	Submit paper form or call CWD

# Portal Risk Mitigation

## Risk Options – July 2022 Release (cont.)

One partial feature is proposed to move to the July 2022 release from Release 1.0 with all other features scheduled for release as planned

Features	Existing in C4Y or YBN?	# of Estimated APIs	Original Release	CWD Process Impacts	Alternative Access Prior to Release
<b>Authorized Representative and CBO Changes**</b> Authorized representative security profile/role, and CBO ongoing case maintenance.	No	2 New	New	Yes	Call CWD
<b>Language Translations</b> 1. Arabic 2. Farsi 3. Hindi 4. Khmer 5. Japanese 6. Mien 7. Punjabi 8. Thai 9. Ukrainian	No	0	3.0	No	Language Line
<b>Time Clocks*</b> The Portal system shall allow the users to view and modify time clocks.	No	TBD	3.0	Yes	Call CWD

# Risk for Portal Go-Live Dates

## Schedule Risk Options: Q&A

1

How does the CalSAWS Team assure the Board that other priorities will not divert the Team from the on-time completion of each phase and that the entire phased release schedule will be completed on time and all functionality will be delivered?

- Deloitte Portal/Mobile Team is dedicated to the delivery of Portal/Mobile and will not be significantly impacted by changes to policy priorities
- Under Option 2, the Accenture Team has less scope than under Option 1, so will be less impacted if there are any extreme changes to policy or priorities
- Option 2 does not change the original overall timeline for completion of BenefitsCal
- Option 2 adds one release between the first and third releases, and adjusts the delivery of certain functions that are not fully defined yet

# Risk for Portal Go-Live Dates

## Schedule Risk Options: Q&A

2

How will the CalSAWS Team communicate status and progress of the Portal/Mobile Project?

- Weekly status reports are prepared and distributed by Deloitte, Accenture and ClearBest
- Monthly updates to the PSC and JPA Board will be presented
- Quality Assurance and IV&V reviews conducted on a continual basis

3

How will the completeness and quality of BenefitsCal be validated?

- BenefitsCal will be tested in several interim releases as part of its proposed development methodology
- BenefitsCal will also be tested as part of the C-IV User Acceptance Test (UAT) phase and will be included within the CalWIN UAT phase. County participants and an independent QA test will provide additional assurances.

# Risk for Portal Go-Live Dates

## Schedule Risk Options: Q&A

4

How will the Los Angeles conversion of document images from EDMS impact the BenefitsCal go-live dates?

- Today, to collect and display documents, YBN interfaces with the Los Angeles imaging system, EDMS.
- There is no plan to build a temporary interface between EDMS and BenefitsCal or between EDMS and CalSAWS.
- The current plan is to complete the cutover of EDMS to CalSAWS Imaging in November 2021.
- Under Option 1, this would be delayed to January 2022.
- Under Option 2, November 2021 will be supported.



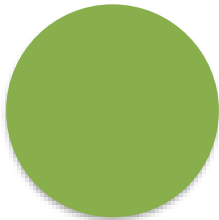
# Informational Items

---



## Portal/Mobile Update

- Brand Update
  - Overview of Survey Outcomes
- 



## We heard from many Californians.

**25,814**

Total submissions

**4,881**

Internal Submissions

**20,933**

External Submissions

**17**

Languages

**57**

Counties

**1**

Clear Winner



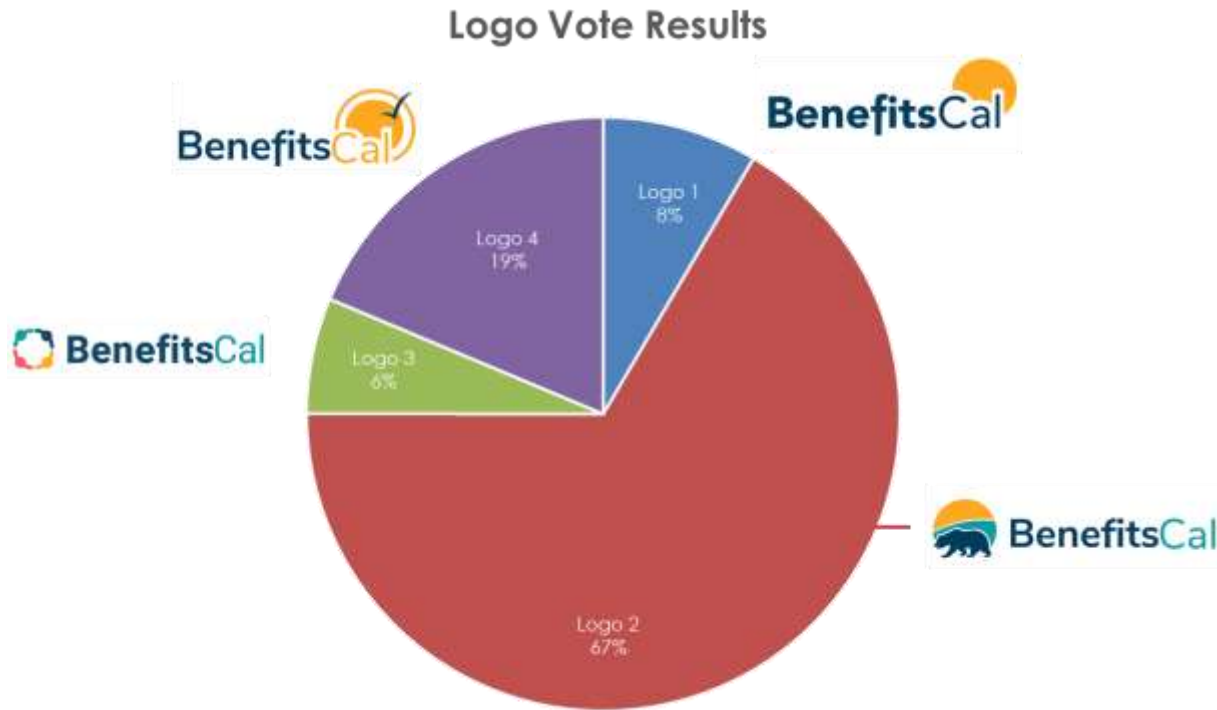
We have a winner!







**BenefitsCal**

# Total Logo Survey Results

Folks resoundingly selected Logo #2, the bear.



## RESULTS

Logo 1 	2,188
Logo 2 	17,178
Logo 3 	1,629
Logo 4 	4,819

Data collected 11/18/2020

# Survey Highlights

# Customer & Assister Logo Survey Results

The survey opened 11/10 and closed 11/18

**20,933**

submissions

**18,395**

customers

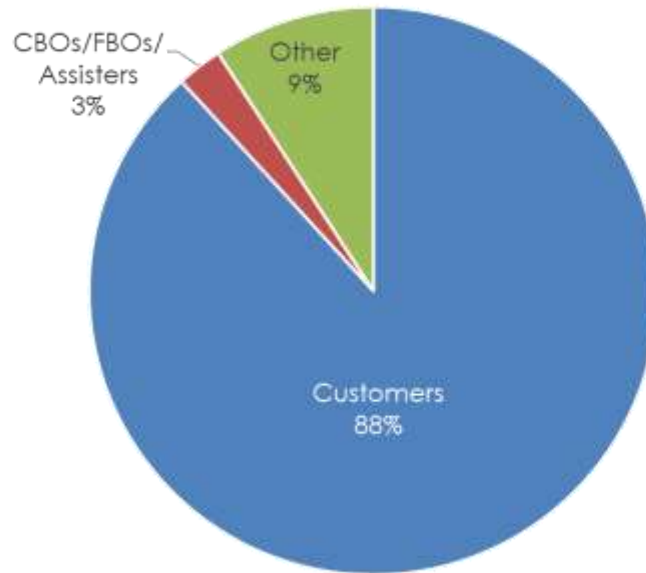
**595**

assisters

**1,943**

other

**Respondent Role (Self-Identified)**



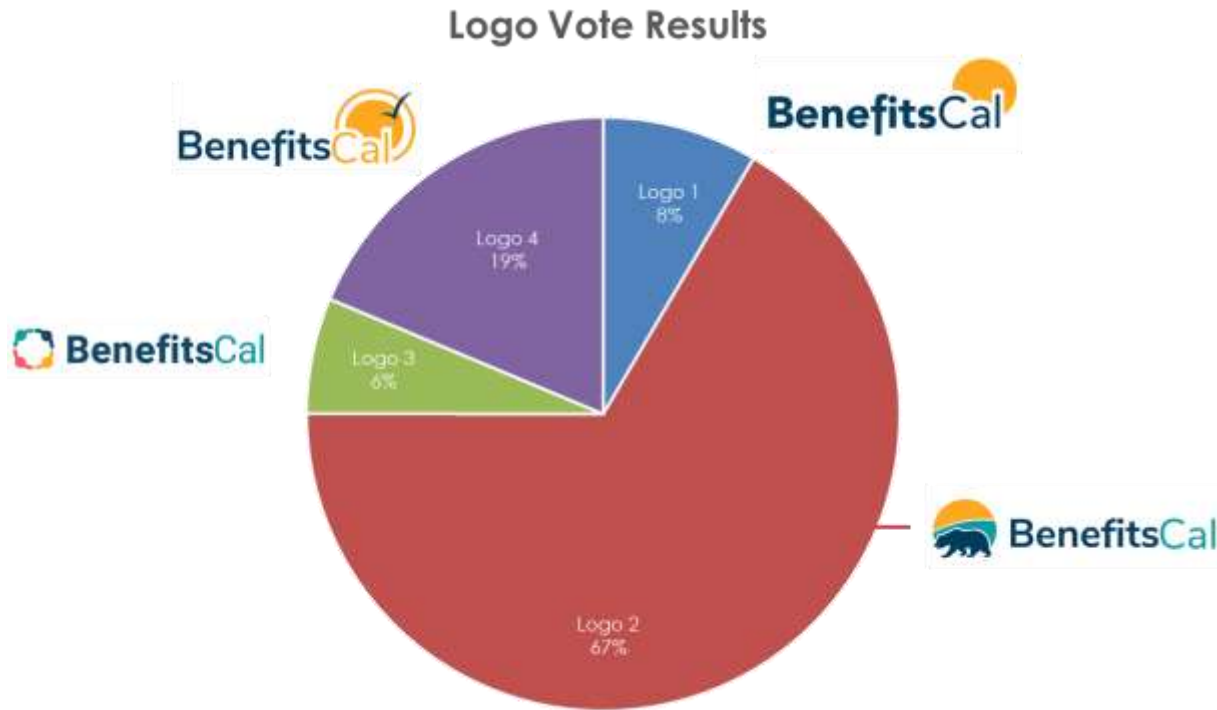
## HIGHLIGHTS

- **20,933** external responses were received.
- The survey link was sent to **1,350,967** customers and **18,192+** assisters.
- We received **13,820** responses in one day – the first day of the survey – demonstrating enthusiasm.
- **8,362** individuals have indicated they would like to participate in future surveys.





Data collected 11/18/2020

# Customer & Assister Logo Survey Results

External Folks also resoundingly selected Logo #2



## RESULTS

Logo 1 	1,839
Logo 2 	13,841
Logo 3 	1,387
Logo 4 	3,866

Data collected 11/18/2020

# Customer & Assister Logo Survey Results

57 of 58 counties are represented by the external survey submissions



## Top 10 Counties by Submissions

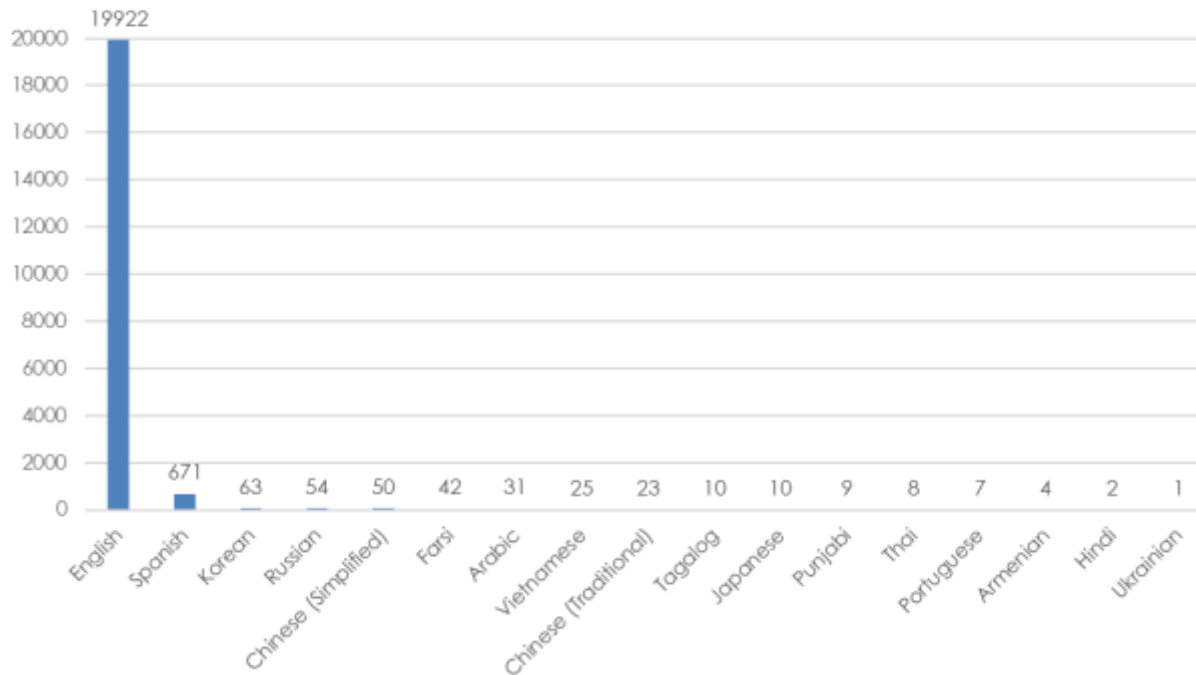
Los Angeles	4,324
San Bernardino	1,590
San Diego	1,379
Orange	1,259
Alameda	1,045
Sacramento	1,014
Riverside	806
Fresno	448
Santa Clara	424
San Joaquin	394

- Alpine is the only county to not have submitted a vote. It's the smallest county in the state, with an estimated population of 1,120.
- More than **50%** of survey respondents are represented by six counties.

# Customer & Assister Logo Survey Results

The survey was available in 19 languages. It was also emailed to customers in all 19 languages.

Submission Languages



## HIGHLIGHTS

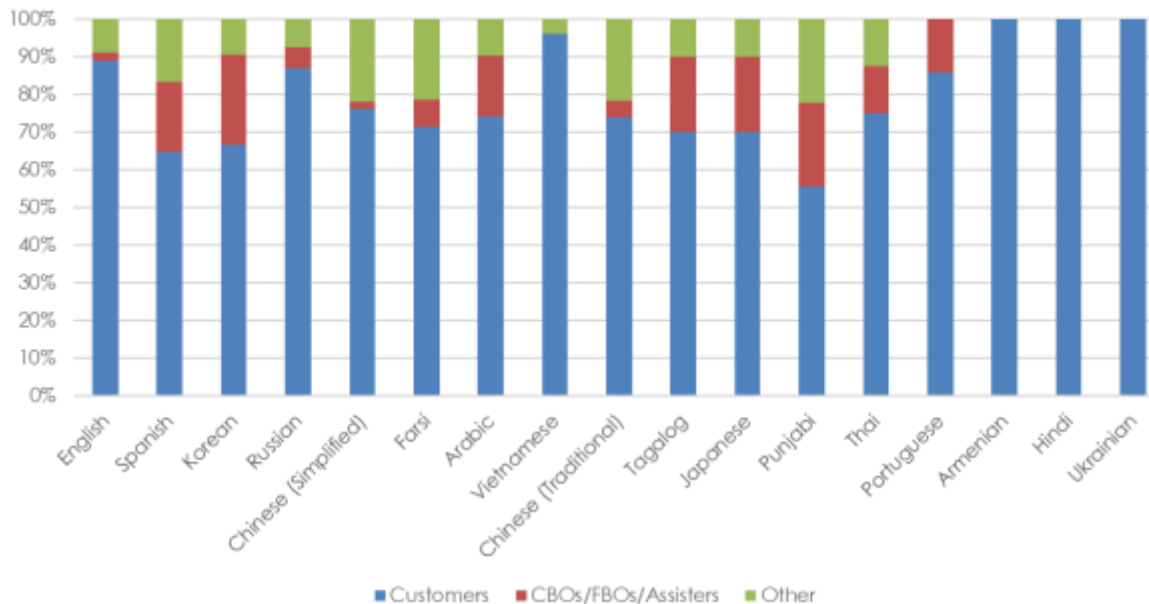
- **17 of 19** languages were used. Lao and Khmer were not used.
- **95%** (19,922) of respondents used English and **3%** (671) used Spanish. The remainder of languages made up less than **2%** (339) of the overall total.

Data collected 11/18/2020

# Customer & Assister Logo Survey Results

Assisters and Others used fewer languages than Customers. Lao and Khmer were not used by any role.

Percentage of Language Submission by Role



## HIGHLIGHTS

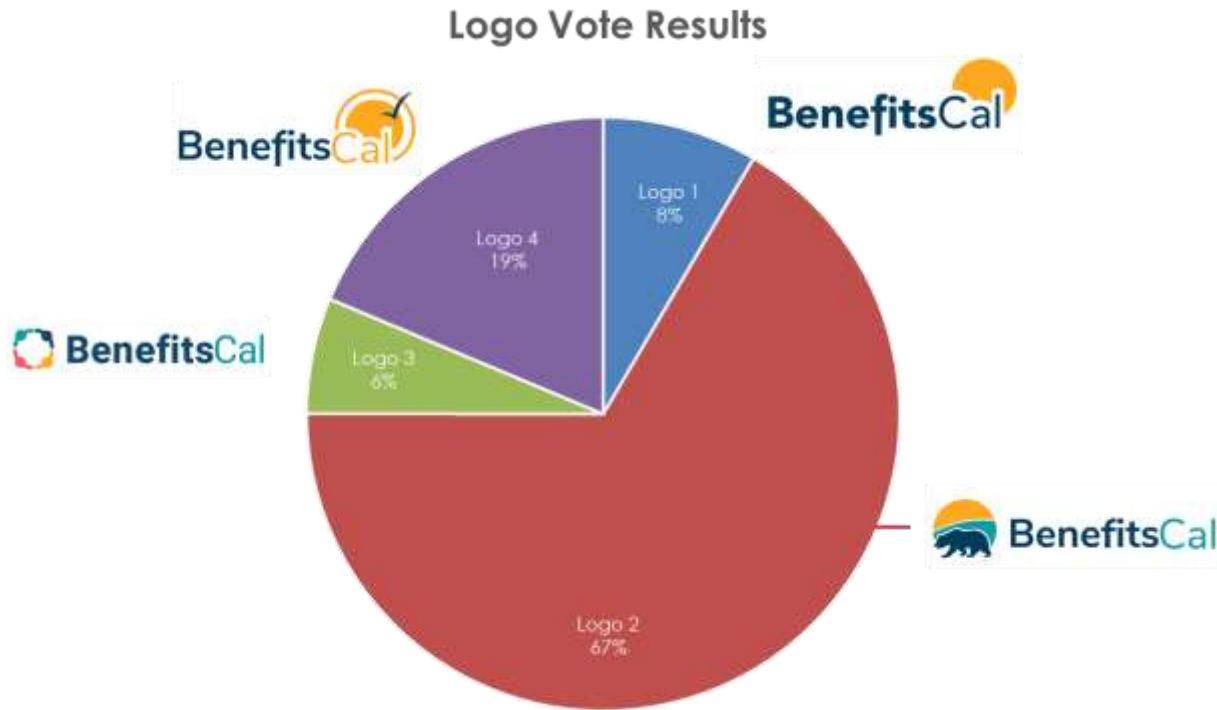
- **17 of 19** languages were used by Customers.
- CBOs/FBOs/Assisters completed the survey in **13** languages. Compared to Customers, this did not include Vietnamese, Armenian, Hindi, and Ukrainian.
- Other completed the survey in **13** languages. Compared to Customers, this did not include Portuguese, Armenian, Hindi, and Ukrainian.

Data collected 11/18/2020







# Internal Logo Survey Results

Internal Folks also resoundingly selected Logo #2



## RESULTS

Logo 1 	349
Logo 2 	3,337
Logo 3 	242
Logo 4 	953

Data collected 11/18/2020

# Internal Logo Survey Results

49 of 58 counties are represented by the internal survey submissions



## Top 10 Counties by Submissions

San Bernardino	1178
Los Angeles	479
Sacramento	382
Riverside	319
Fresno	236
Merced	199
Contra Costa	158
Sonoma	140
San Joaquin	120
San Luis Obispo	114

## HIGHLIGHTS

- The following counties did not submit votes: Alpine, Humboldt, Lassen, Marin, Mariposa, Modoc, San Benito, Sierra, and Trinity.
- More than **50%** of survey respondents are represented by five counties.

Data collected 11/18/2020. Location data is extrapolated by IP address. Survey data was not available for 339 respondents, a majority of which likely block their browser from tracking location.



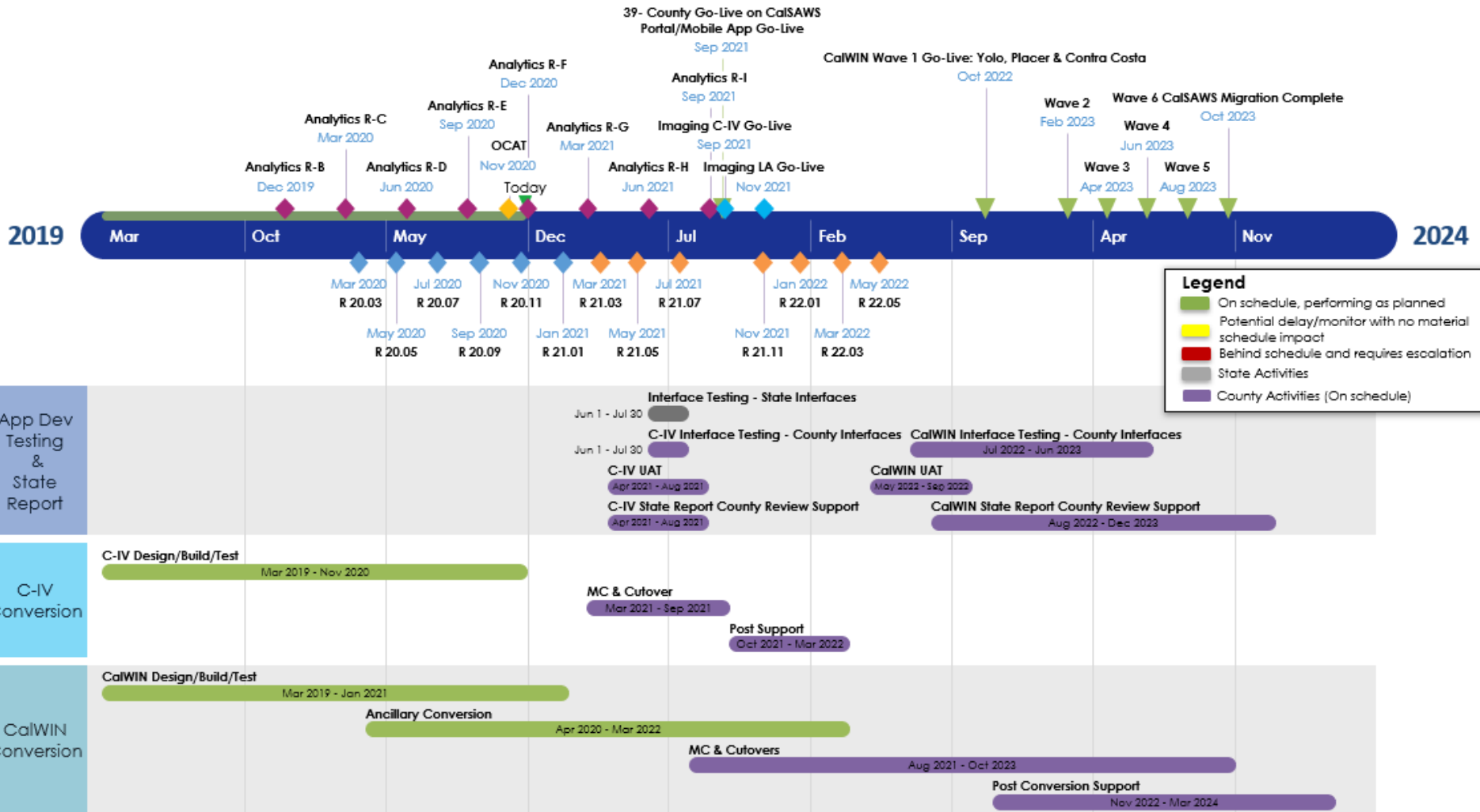
# CalSAWS Gantt Chart Update



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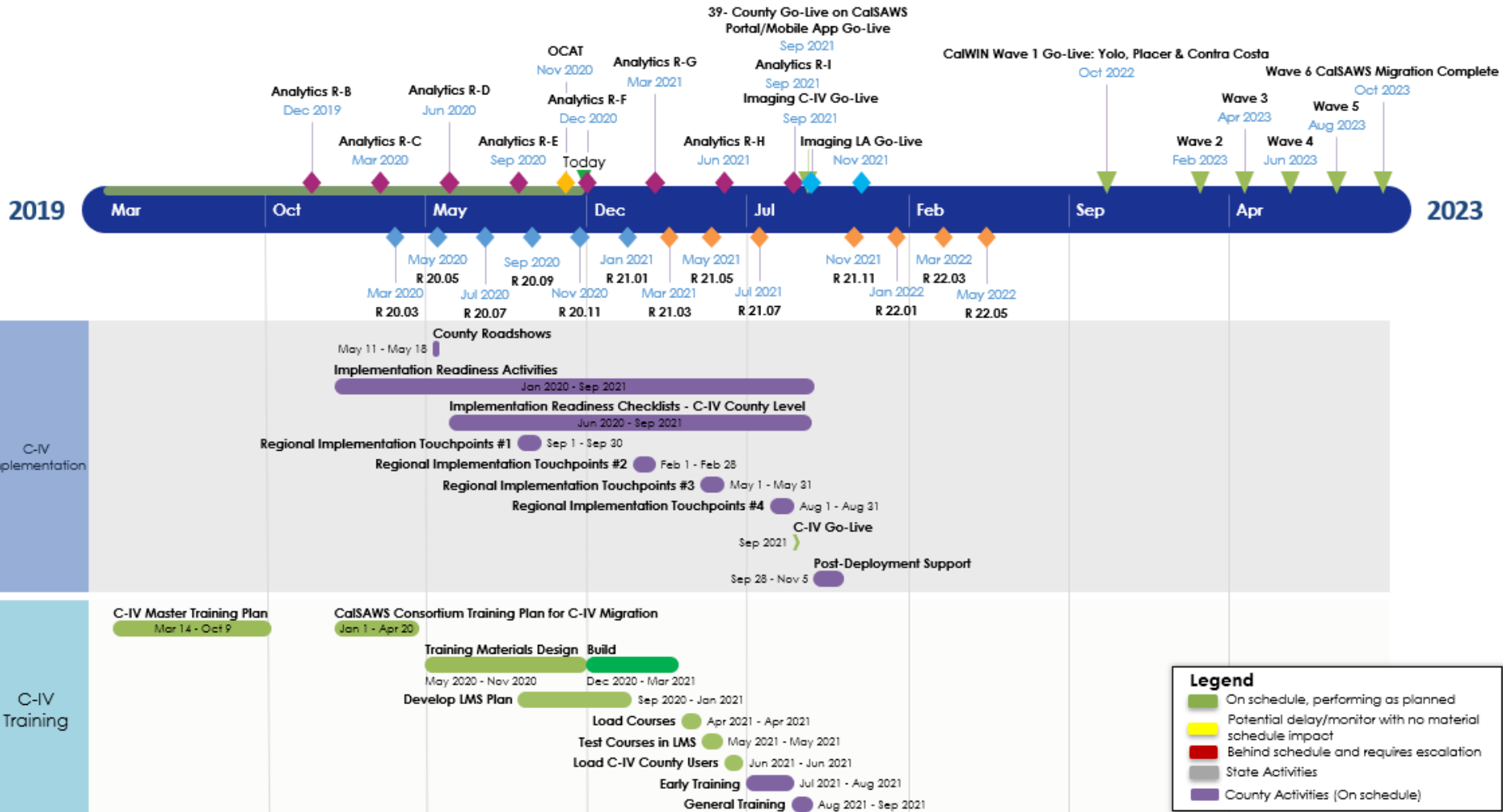
# CalSAWS Project Gantt

## High Level Overview- App Dev & Conversion



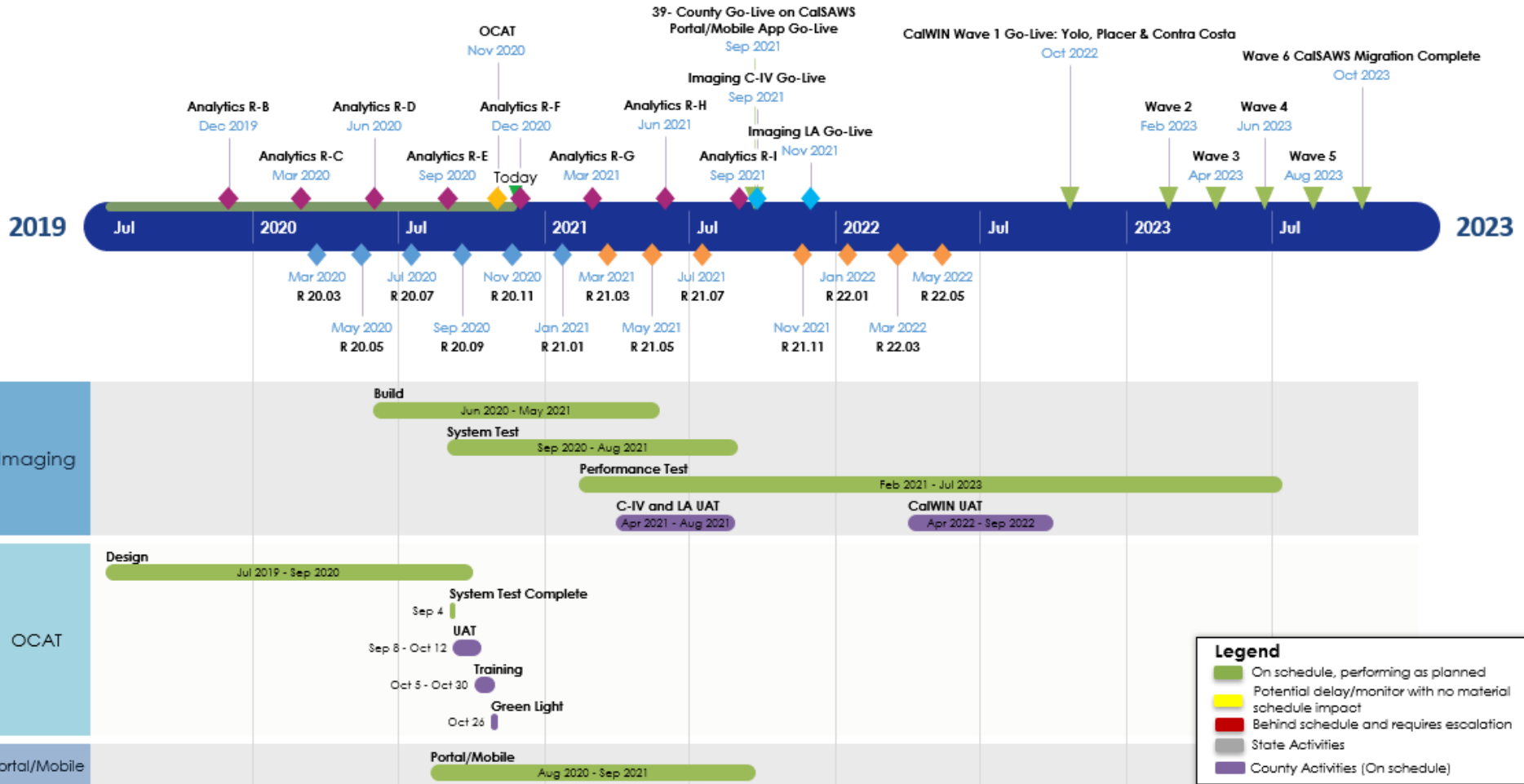
# CalSAWS Project Gantt

## High Level Overview- C-IV & Implementation



# CalSAWS Project Gantt

## High Level Overview- Imaging, OCAT, & Portal Mobile





Introducing the Power of 58  
Communication Campaign



---

## A Refreshed Look & Feel

A holistic CalSAWS project look and feel that communicates a compelling vision to employees in an appealing, relevant and memorable way.



# THE POWER OF 58



WHEN SAN FRANCISCO COLLABORATES WITH NAPA.  
WHEN LOS ANGELES TEAMS UP WITH SAN BERNARDINO.  
WHEN WE ALL WORK TOGETHER,

## THE RESULTS ARE POWERFUL.

# CalSAWS

# Guides & Core Assets



Logo lock-up source files

## Approved Copy & Headlines

- 70,000 Workers. 58 Counties. 1 System. Endless Possibilities.
- All for One. And One System for All.
- When We All Work Together, The Results Are Powerful.
- Introducing the Power to Help More People. Together.
- Helping You Help California
- All Together Now



Statewide & County Specific Doodles



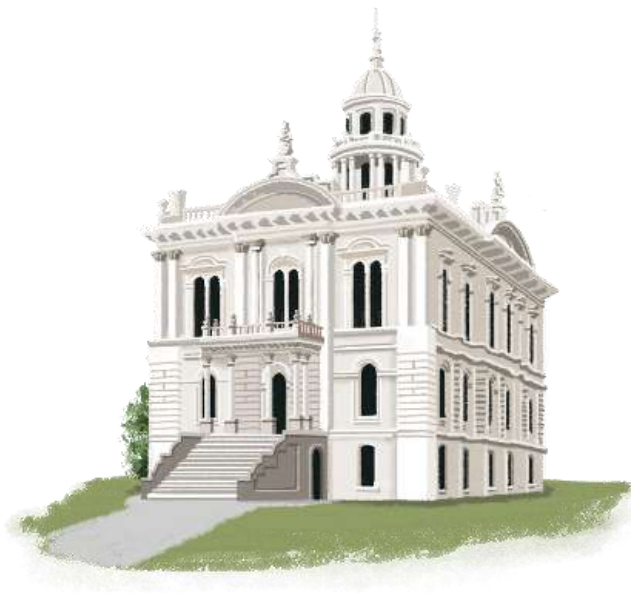
Staff Portraits with source files ability for unlimited customization

# Ventura County

THE  
POWER  
OF 58

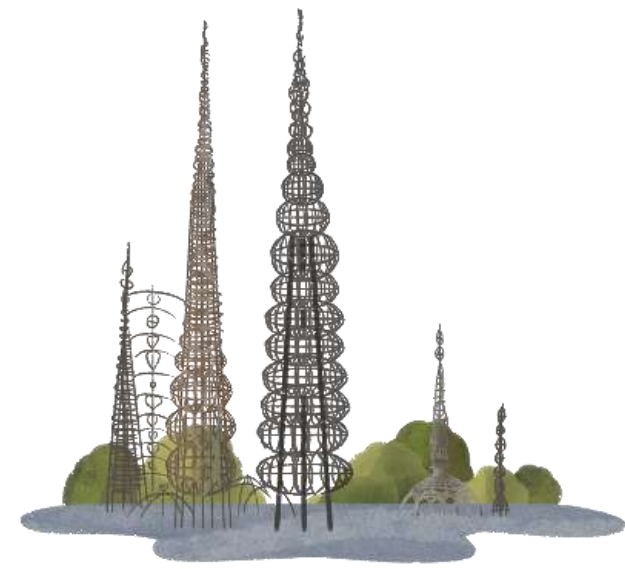


# Merced County



LA County

THE  
POWER  
OF 58



# CalSAWS Project Team Line of Sight



# County Available Assets



Video Conferencing Backgrounds



Email Signatures

**Firstname Last**  
 Job Title  
 Cityname, CA  
 m: (987) 654-3210

CalSAWS | THE POWER OF 58

Flyer Template



PowerPoint Template



## Web Portal (for county access)

The image shows two overlapping screenshots of the CalSAWS Web Portal. The top screenshot shows the main portal page with a navigation menu. The 'Resources' link in the menu is highlighted with a yellow box. A yellow arrow points from this box to the bottom screenshot. The bottom screenshot shows the 'Resources' page, which is a list of folders. The folder named 'Power of 58' is highlighted with a yellow box. A yellow arrow points from this box to the text below.

SharePoint > Web Portal > Resources > Power of 58

Region	# of Counties
1	32
2	33
3	34


Name	Modified	Modified By	Name
Non-Consumption Data requests	January 11, 2010	system account	Non-Consumption Data requests
Performance Charts	September 16, 2010	System Account	Performance Charts
Performance Reports	August 9, 2010	System Account	Performance Reports
Power of 58	4 minutes ago	Phela Timber	Power of 58
Resources by Functional Area	February 12, 2013	Taras Steinhilber	Resources by Functional Area
Security	April 26, 2011	System Account	Security
SOSPs	May 2, 2016	Jonathan Walburger	SOSPs



What do you think?

Go to [www.menti.com](http://www.menti.com) and use the code 59 02 51 9

**How do you think the counties should use the new  
Power of 58 look and feel?**

 Mentimeter



# CalSAWS Diversity, Equity, & Inclusion (DEI) Update

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# IDEA

## Purpose, Mission, and Vision

### **Purpose**

The Inclusion, Diversity and Equity Advancement (IDEA) team at CalSAWS was created to provide resources, processes, and support for the diverse group of employees that make up the CalSAWS organization. The first IDEA pillar, “Being The Change” was prompted by the recent scale of recognition to social injustice and systematic racism in the U.S. Along with many other well-respected organizations, CalSAWS’ leadership recognized the need for underrepresented groups to feel included.

Using user-centered design, a group of 25 diverse employees participated in collaborative sessions to develop intentionally inclusive initiatives that will advance diversity, inclusion and equity at CalSAWS. Expansion of IDEA will incorporate more voices from diverse groups to maximize our ability to respect differences of the employees and communities we serve.

### **Mission**

Promote a visible commitment to diversity, equity and inclusion that guides our behaviors and business strategies in a manner that maximizes our ability to respect differences of employees and communities we serve.

### **Vision**

Enhance, modify and transform the DEI culture at CalSAWS with the intentions to cultivate a supportive and inclusive work environment while fostering equity and opportunity for all groups; leveraging agile and innovative methodologies.

# IDEA

## Inclusion, Diversity and Equity Advancement Initiatives

INITIATIVE	FOCUS	OBJECTIVE	BRIEF DESCRIPTION
<b><i>Developing a CalSAWS I&amp;D Vision: "We are one"</i></b>	 HR	An aggregate of inclusion and diversity resources in a central and easily accessible location.	A place for all staff to go to for all I&D needs (i.e. links to HR resources or additional support)
<b><i>Project Pulse</i></b>	 SURVEY	Gather clarifying data to show where, and how different groups of employees experience the CalSAWS inclusion and diversity culture.	Create a survey assessing all project staff's experiences in the workplace as it relates to I&D
<b><i>Buddy Program</i></b>	 MENTORSHIP	Provide diverse groups with a network within CalSAWS and someone to help them identify and improve skills and knowledge necessary for advancement.	Connect mentors/mentees with a diverse individual(s) they may not naturally engage with otherwise
<b><i>Lead with Intention</i></b>	 LEADERSHIP	Provide leaders, who are open to challenging their own perspectives and creating more productive and inclusive teams, with the skills to build a CalSAWS team in which everyone has access and equal opportunity to success.	Leadership development program as well as peer program to help individuals grow into better leaders
<b><i>Me, You, Us Training</i></b>	 TRAINING	Create awareness of ourselves and our colleagues to work better together.	Training that promotes awareness of ourselves and our colleagues, allowing us to acknowledge differences
<b><i>Co-Creating on Inclusion &amp; Belonging</i></b>	 WORKSHOPS	Create opportunities for groups to refresh and expand their awareness of inclusion and diversity issues in an interactive forum.	Workshops to encourage inclusivity, equity, and diversity project-wide
<b><i>CalSAWS Table Talks</i></b>	 SAFE SPACE	Encourage educating ourselves on diverse experiences by providing a safe space for candid conversations with our CalSAWS co-workers to share on topics focused on current events, professional stories and personal experiences.	A safe space for all to come together and share professional and personal experiences; providing a platform for genuine connections to be formed

# IDEA

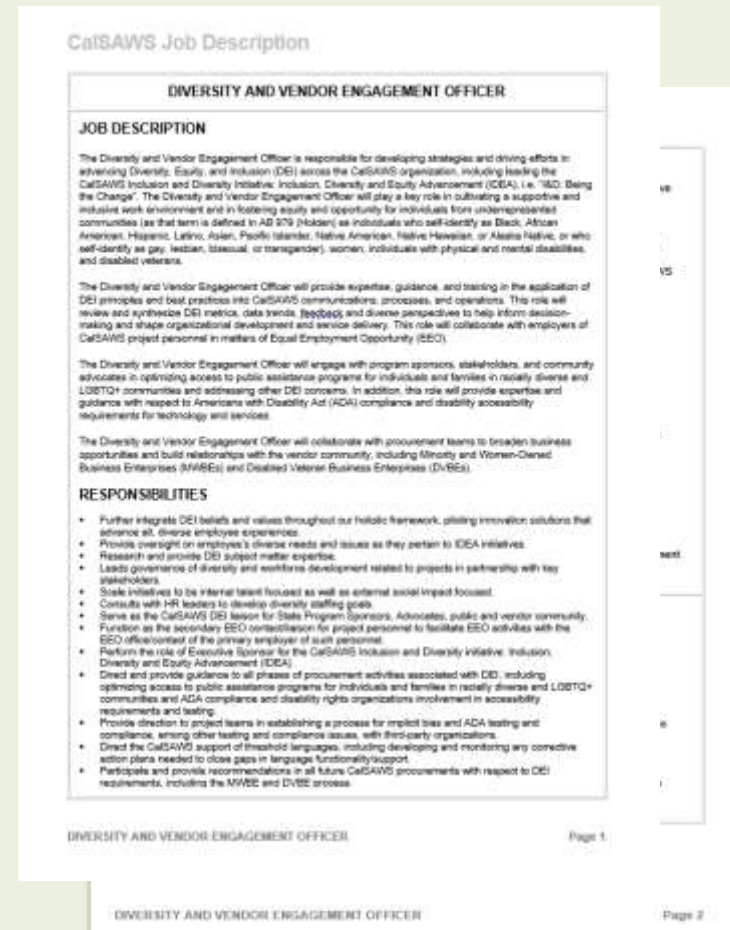
## Training Plans to Date

- Participated in overview of Sacramento County Diversity Awareness Training on November 5<sup>th</sup>
- Participated in Sacramento County SOGI Training on November 12<sup>th</sup>
- Scheduled to support Sacramento County's development of self-directed training materials in mid-December, which can then be leveraged by the Consortium



## Staffing & Resources

- Recruitment planned for the Diversity & Vendor Engagement Officer for January 2021, concurrent county and public posting
- Initiated service request through Regional Government Services (RGS) to support initial IDEA initiatives, oversee development of processes and training plans, review procurement guidelines, assess recruitment efforts



# IDEA

## Vendor Diversity Plans

All vendor Diversity Plans are posted to CalSAWS.org - About Us

The top screenshot shows the CalSAWS website header with the 'About Us' link circled in red. The main content area features a large image of a woman and a child with the text 'We are ONE! One Team, One System, One Goal!' and a 'Watch Video' button. To the right, there is a section titled 'Agendas of Upcoming and Recent Meetings' listing several meetings.

The bottom screenshot shows the 'Vendor Diversity Plans' link circled in red in a list of links. Below this link is a list of vendor names: RGS, Accenture, Gainwell, ClearBest, First Data, Infosys, Deloitte, and Cambria.

**RGS**  
**Accenture**  
**Gainwell**  
**ClearBest**  
**First Data**  
**Infosys**  
**Deloitte**  
**Cambria**



# Application Development & Policy

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# Policy Update

## Aged, Blind, Disabled FPL Expansion/ AB 1088

Aged/Blind/Disable Federal Poverty Level (FPL) Expansion – Systems changes were implemented in November 2020 for the December 2020 benefit month. The systems were updated to compare countable income to 138% of FPL for the applicable family size for the A&D FPL and Blind FPL programs.

AB 1088/ Medicare Part B Premium Disregard - Systems changes were implemented in November 2020 for the December 2020 benefit month. The systems were updated to apply a new income disregard equal to the amount of the individual's Medicare Part B Premium when determining eligibility for the A&D FPL or Blind FPL program if the Medicare Part B Payment is paid by the State.

-Continued on next slide-

# Policy Update

## 2021 SSA COLA/ Childcare Summary Page & Monthly Report

Social Security Administration (SSA) Cost of Living Adjustment (COLA) for 2021 – SSA approved a 1.3% increase for SSA benefits effective January 1, 2021. In December 2020, the applicable values were updated in the systems and a batch EDBC process will updated the impacted cases.

Childcare online summary page and Stage 2 contractors monthly report will be implemented in November 2020 (CalWIN) and December 2020 (C-IV and LRS).



# Quarterly CalSAWS Fiscal Update

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# CalSAWS Quarterly Financial Updates

## Overview

CalSAWS DD&I and  
Premise

CalWIN M&O

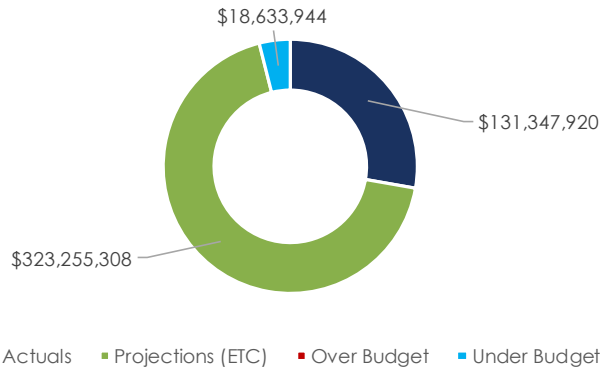
C-IV M&O

LRS M&O

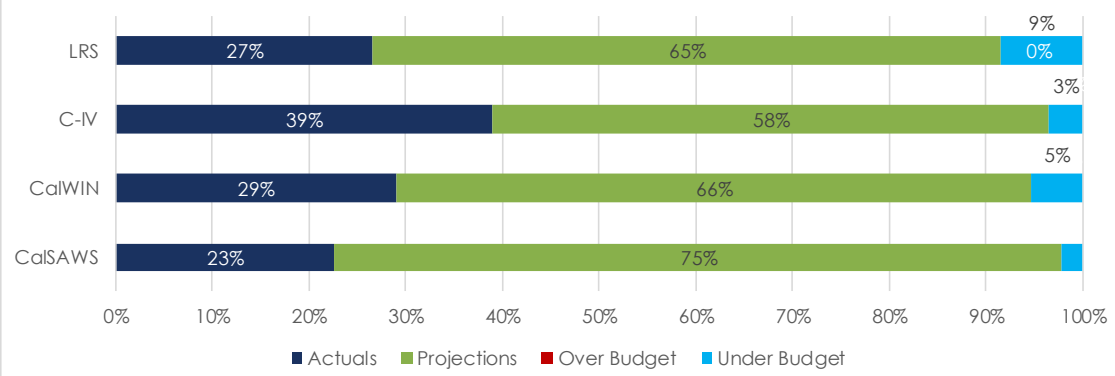
JPA Admin

- 1 Actuals to Date  
**Based on Vendor Invoices & County Claims**
- 2 Projections (Estimates to Complete)  
**Estimated Costs for Future Months**
- 3 Estimate at Completion (EAC)  
**Actual Costs Plus Estimated**
- 4 Total Allocation/Budget  
**Amount Allocated by Line Item for the Approved Budget**
- 5 Balance  
**Difference Between EAC and Budget**  
**Negative balance is over budget**  
**Positive balance is under budget**
- 6 % Expended to Date (Actuals)  
**Percent of Actuals to Date Divided by the Budget**
- 7 % EAC to Budget  
**Percent of EAC Divided by the Budget**

Total Actuals & Projections



% Expended to Date



Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS</b>	<b>\$47,315,074</b>	<b>\$157,563,028</b>	<b>\$204,878,102</b>	<b>\$209,289,865</b>	<b>\$4,411,763</b>	<b>22.6%</b>	<b>97.9%</b>	
DD&I App. Dev.	\$9,912,772	\$25,471,593	\$35,384,365	\$35,384,365	\$0	28.0%	100.0%	
DD&I Non-App. Dev.	\$33,194,614	\$75,072,930	\$108,267,544	\$111,772,678	\$3,505,134	29.7%	96.9%	County Support Staff CRFI 20-026 & 20-030 Shift Requests
DD&I Training	\$235,616	\$2,779,270	\$3,014,886	\$3,014,886	\$0	7.8%	100.0%	
DD&I GA/GR	\$589,680	\$6,615,690	\$7,205,370	\$7,205,370	\$0	8.2%	100.0%	
DD&I Procurement	\$234,878	\$1,251,747	\$1,486,625	\$1,982,945	\$496,320	11.8%	75.0%	
CalSAWS M&O	\$807,506	\$10,026,289	\$10,833,795	\$10,833,795	\$0	7.5%	100.0%	
CalSAWS Premise	\$2,340,008	\$36,345,509	\$38,685,517	\$39,095,826	\$410,309	6.0%	99.0%	Projected Savings from OCAT Facilities & Brown Tapia
<b>CalWIN M&amp;O</b>	<b>\$31,779,776</b>	<b>\$72,129,584</b>	<b>\$103,909,360</b>	<b>\$109,731,489</b>	<b>\$5,822,129</b>	<b>29.0%</b>	<b>94.7%</b>	
CalWIN M&O	\$28,687,955	\$65,862,301	\$94,550,256	\$94,550,256	\$0	30.3%	100.0%	
CalHEERS Interface	\$2,521,273	\$5,065,028	\$7,586,301	\$13,325,231	\$5,738,930	18.9%	56.9%	Projected Savings from Application Maintenance
CalHEERS CSCN	\$570,548	\$1,202,255	\$1,772,803	\$1,856,002	\$83,199	30.7%	95.5%	Projected Savings from Application Maintenance
<b>C-IV M&amp;O</b>	<b>\$36,047,324</b>	<b>\$53,353,992</b>	<b>\$89,401,316</b>	<b>\$92,610,360</b>	<b>\$3,209,044</b>	<b>38.9%</b>	<b>96.5%</b>	
C-IV M&O	\$32,661,567	\$46,036,901	\$78,698,468	\$78,899,501	\$201,033	41.4%	99.7%	
CalHEERS Interface	\$2,388,886	\$4,954,940	\$7,343,826	\$10,351,837	\$3,008,011	23.1%	70.9%	Projected Savings from Application Maintenance
Covered CA CSC	\$996,871	\$2,362,151	\$3,359,022	\$3,359,022	\$0	29.7%	100.0%	
<b>LRS M&amp;O</b>	<b>\$16,199,821</b>	<b>\$39,433,119</b>	<b>\$55,632,940</b>	<b>\$60,823,948</b>	<b>\$5,191,008</b>	<b>26.6%</b>	<b>91.5%</b>	
LRS M&O	\$16,199,821	\$36,181,109	\$52,380,930	\$55,525,576	\$3,144,646	29.2%	94.3%	Projected Savings from Hardware/Software, & Staff
CalHEERS Interface	\$0	\$3,252,010	\$3,252,010	\$5,298,372	\$2,046,362	0.0%	61.4%	Projected Savings from Application Maintenance
<b>JPA Admin. Budget</b>	<b>\$5,925</b>	<b>\$775,585</b>	<b>\$781,510</b>	<b>\$781,510</b>	<b>\$0</b>	<b>0.8%</b>	<b>100.0%</b>	
CalSAWS 58 Counties	\$5,925	\$775,585	\$781,510	\$781,510	\$0	0.8%	100.0%	
<b>Total</b>	<b>\$131,347,920</b>	<b>\$323,255,308</b>	<b>\$454,603,228</b>	<b>\$473,237,172</b>	<b>\$18,633,944</b>	<b>27.8%</b>	<b>96.1%</b>	

<sup>1</sup>: July-October partial actuals (Invoices)

## CalSAWS | SFY 2020/21 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS DD&amp;I</b>	<b>\$6,244,418</b>	<b>\$13,920,418</b>	<b>\$20,164,836</b>	<b>\$20,661,156</b>	<b>\$496,320</b>	<b>30.2%</b>	<b>97.6%</b>	
Consortium Personnel - County <sup>1</sup>	\$2,209,990	\$7,161,747	\$9,371,737	\$9,371,737	\$0	23.6%	100.0%	
Consortium Personnel - Contractor <sup>2,3</sup>	\$4,034,428	\$6,758,671	\$10,793,099	\$11,289,419	\$496,320	35.7%	95.6%	Procurement Staff Savings
<b>CalWIN M&amp;O</b>	<b>\$1,412,466</b>	<b>\$2,974,793</b>	<b>\$4,387,259</b>	<b>\$4,387,259</b>	<b>\$0</b>	<b>32.2%</b>	<b>100.0%</b>	
Consortium Personnel - County <sup>1</sup>	\$17,227	\$144,773	\$162,000	\$162,000	\$0	10.6%	100.0%	
Consortium Personnel - Contractor <sup>2,3</sup>	\$1,395,239	\$2,830,020	\$4,225,259	\$4,225,259	\$0	33.0%	100.0%	
<b>C-IV M&amp;O</b>	<b>\$1,087,966</b>	<b>\$2,939,501</b>	<b>\$4,027,467</b>	<b>\$4,228,500</b>	<b>\$201,033</b>	<b>25.7%</b>	<b>95.2%</b>	
Consortium Personnel - County	\$319,870	\$1,756,571	\$2,076,441	\$2,076,441	\$0	15.4%	100.0%	
Consortium Personnel - Contractor <sup>2</sup>	\$768,096	\$1,182,930	\$1,951,026	\$2,152,059	\$201,033	35.7%	90.7%	
<b>LRS M&amp;O</b>	<b>\$1,772,157</b>	<b>\$10,702,277</b>	<b>\$12,474,434</b>	<b>\$13,373,256</b>	<b>\$898,822</b>	<b>13.3%</b>	<b>93.3%</b>	
Consortium Personnel - County	\$1,755,967	\$10,702,277	\$12,458,244	\$13,357,066	\$898,822	13.1%	93.3%	
Consortium Personnel - Contractor <sup>2</sup>	\$16,190	\$0	\$16,190	\$16,190	\$0	100.0%	100.0%	
<b>Premise</b>	<b>\$88,779</b>	<b>\$769,148</b>	<b>\$857,927</b>	<b>\$857,927</b>	<b>\$0</b>	<b>10.3%</b>	<b>100.0%</b>	
Consortium Personnel - County	\$26,899	\$670,140	\$697,039	\$697,039	\$0	3.9%	100.0%	
Consortium Personnel - Contractor <sup>2</sup>	\$61,880	\$99,008	\$160,888	\$160,888	\$0	38.5%	100.0%	
<b>Total</b>	<b>\$10,605,786</b>	<b>\$31,306,137</b>	<b>\$41,911,923</b>	<b>\$43,508,098</b>	<b>\$1,596,175</b>	<b>24.4%</b>	<b>96.3%</b>	

## CalSAWS | SFY 2020/21 CONSORTIUM PERSONNEL BUDGET & FTEs

SFY 2020/21 - Consortium Personnel FTE Counts	Current/Planned FTEs
<b>CalSAWS DD&amp;I</b>	<b>110</b>
Consortium Personnel - County <sup>1</sup>	39
Consortium Personnel - Contractor <sup>2</sup>	45
Consortium Personnel - Contractor Limited Term <sup>3</sup>	17
TBD <sup>4</sup>	9
<b>CalWIN M&amp;O</b>	<b>21</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	12
Consortium Personnel - Contractor Limited Term <sup>3</sup>	6
TBD <sup>4</sup>	2
<b>C-IV M&amp;O</b>	<b>25</b>
Consortium Personnel - County <sup>1</sup>	13
Consortium Personnel - Contractor <sup>2</sup>	9
Consortium Personnel - Contractor Limited Term <sup>3</sup>	1
TBD <sup>4</sup>	2
<b>LRS M&amp;O</b>	<b>68</b>
Consortium Personnel - County <sup>1</sup>	68
Consortium Personnel - Contractor <sup>2</sup>	0
Consortium Personnel - Contractor Limited Term <sup>3</sup>	0
TBD <sup>4</sup>	0
<b>Premise</b>	<b>2</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	1
<b>Total</b>	<b>226</b>

<sup>1</sup>Includes only Consortium Staff, does not include County Support Staff

<sup>2</sup>Includes RGS and CSAC employees

<sup>3</sup>Includes RGS, CSAC, and First Data Staff (Non-Employees)

<sup>4</sup>Does not account for backfill considerations

## CalSAWS | SFY 2020/21 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

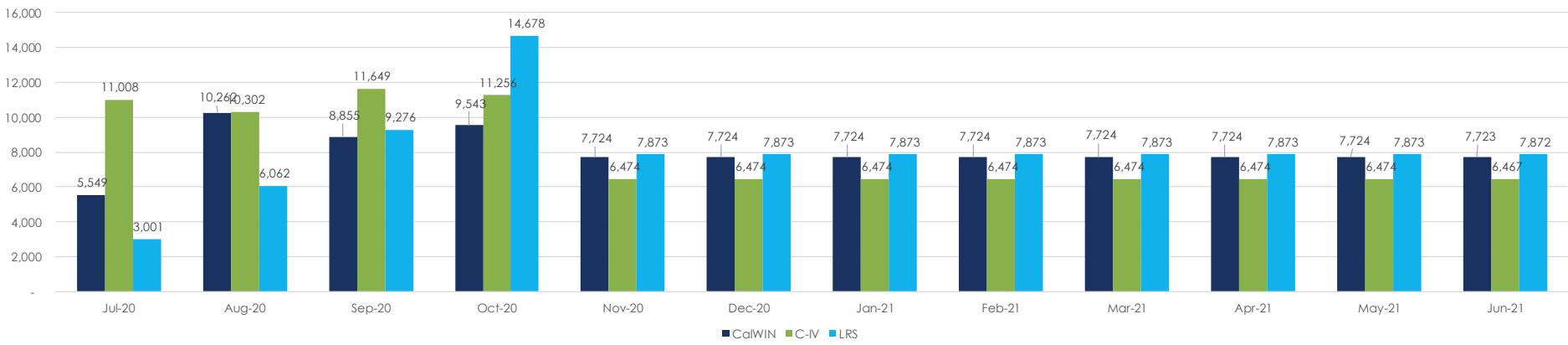
Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalWIN M&amp;O</b>	<b>\$6,722,805</b>	<b>\$21,900,993</b>	<b>\$28,623,798</b>	<b>\$34,445,927</b>	<b>\$5,822,129</b>	<b>19.5%</b>	<b>83.1%</b>	
CalWIN M&O	\$5,685,704	\$7,990,723	\$13,676,427	\$13,676,427	\$0	41.6%	100.0%	
CalHEERS Interface Change Budget	\$544,502	\$1,999,354	\$2,543,856	\$8,282,786	\$5,738,930	6.6%	30.7%	Projected Savings from Application Maintenance
CalHEERS CSCN Change Budget	\$0	\$166,396	\$166,396	\$249,595	\$83,199	0.0%	66.7%	
CalWIN Premise	\$492,599	\$11,744,520	\$12,237,119	\$12,237,119	\$0	4.0%	100.0%	
<b>C-IV M&amp;O</b>	<b>\$10,675,028</b>	<b>\$16,666,912</b>	<b>\$27,341,940</b>	<b>\$30,509,509</b>	<b>\$3,167,569</b>	<b>35.0%</b>	<b>89.6%</b>	
C-IV M&O	\$9,465,760	\$7,838,240	\$17,304,000	\$17,304,000	\$0	54.7%	100.0%	
CalHEERS Interface Change Budget	\$507,666	\$1,852,166	\$2,359,832	\$5,367,843	\$3,008,011	9.5%	44.0%	Projected Savings from Application Maintenance
Covered CA CSC Change Budget	\$143,202	\$558,366	\$701,568	\$701,568	\$0	20.4%	100.0%	
C-IV Premise	\$558,400	\$6,418,140	\$6,976,540	\$7,136,098	\$159,558	7.8%	97.8%	Savings from Brown Tapia
<b>LRS M&amp;O</b>	<b>\$6,160,951</b>	<b>\$20,170,050</b>	<b>\$26,331,001</b>	<b>\$28,604,085</b>	<b>\$2,273,084</b>	<b>21.5%</b>	<b>92.1%</b>	
LRS M&E	\$5,436,456	\$5,987,544	\$11,424,000	\$11,424,000	\$0	47.6%	100.0%	
CalHEERS Interface Change Budget	\$0	\$1,498,090	\$1,498,090	\$3,544,452	\$2,046,362	0.0%	42.3%	Projected Savings from Application Maintenance
LRS/Calsaws Premise	\$724,495	\$12,684,416	\$13,408,911	\$13,635,633	\$226,722	5.3%	98.3%	Savings from Brown Tapia
<b>TOTAL</b>	<b>\$23,558,784</b>	<b>\$58,737,955</b>	<b>\$82,296,739</b>	<b>\$93,559,521</b>	<b>\$11,262,782</b>	<b>25.2%</b>	<b>88.0%</b>	

Note: Includes 8,000 hours/month for M&O per system, plus premise hours.



CalSAWS | SFY 2020/21 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM

Application Maintenance Hours/Month



## CalSAWS | SFY 2020/21 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM

Change Budget Category	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Total
<b>CalWIN M&amp;O</b>	<b>5,549</b>	<b>10,262</b>	<b>8,855</b>	<b>9,543</b>	<b>7,724</b>	<b>7,724</b>	<b>7,724</b>	<b>7,724</b>	<b>7,724</b>	<b>7,724</b>	<b>7,724</b>	<b>7,723</b>	<b>96,000</b>
Design & Build	1,573	2,596	1,064	1,589	-	-	-	-	-	-	-	-	6,822
Test	1,025	3,766	3,232	4,445	-	-	-	-	-	-	-	-	12,468
Management & Other Support <sup>1</sup>	2,951	3,900	4,559	3,509	-	-	-	-	-	-	-	-	14,919
Projection	-	-	-	-	7,724	7,724	7,724	7,724	7,724	7,724	7,724	7,723	61,791
<b>C-IV M&amp;O</b>	<b>11,008</b>	<b>10,302</b>	<b>11,649</b>	<b>11,256</b>	<b>6,474</b>	<b>6,474</b>	<b>6,474</b>	<b>6,474</b>	<b>6,474</b>	<b>6,474</b>	<b>6,474</b>	<b>6,467</b>	<b>96,000</b>
Design & Build	5,969	5,668	7,303	6,783	-	-	-	-	-	-	-	-	25,723
Test	1,193	482	207	262	-	-	-	-	-	-	-	-	2,144
Management & Other Support <sup>2</sup>	3,846	4,152	4,139	4,211	-	-	-	-	-	-	-	-	16,348
Projection	-	-	-	-	6,474	6,474	6,474	6,474	6,474	6,474	6,474	6,467	51,785
<b>LRS M&amp;O</b>	<b>3,001</b>	<b>6,062</b>	<b>9,276</b>	<b>14,678</b>	<b>7,873</b>	<b>7,873</b>	<b>7,873</b>	<b>7,873</b>	<b>7,873</b>	<b>7,873</b>	<b>7,873</b>	<b>7,872</b>	<b>96,000</b>
Design & Build	1,623	4,252	2,841	4,858	-	-	-	-	-	-	-	-	13,574
Test	684	986	1,089	3,104	-	-	-	-	-	-	-	-	5,863
Management & Other Support <sup>3</sup>	694	824	5,346	6,716	-	-	-	-	-	-	-	-	13,580
Projection	-	-	-	-	7,873	7,873	7,873	7,873	7,873	7,873	7,873	7,872	62,983
<b>COMBINED TOTAL</b>	<b>19,558</b>	<b>26,626</b>	<b>29,780</b>	<b>35,477</b>	<b>22,071</b>	<b>22,071</b>	<b>22,071</b>	<b>22,071</b>	<b>22,071</b>	<b>22,071</b>	<b>22,071</b>	<b>22,062</b>	<b>288,000</b>

### NOTES:

Actuals for July - Oct Payment Months. Projections for remaining months, actuals are trending high. Additional hours pending approval of the Jan. Gov Budget.

#### Management & Other Support Includes:

	<sup>1</sup> CalWIN	<sup>2</sup> C-IV	<sup>3</sup> LRS
Project Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Release Communication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SIRFRA/ SCERFRA/ External Inquiries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Technical Support (Release Support)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Change Management/Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Defect Fix (If Not Warrantable)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Batch Support	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Level 3 Application Support	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Meetings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Translation Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offsets Due to Liquidated Damages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Data Change Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# CalSAWS | SFY 2020/21 CONTRACT OBLIGATIONS

## Warranty & Liquidated Damages Detail - SFY 2020/21

Category	Contract	Service Month	Amount	Invoice Month	Invoice #
Deficiency Resolution Timeliness; Disaster Recovery (Pending)	CalWIN	December-19	\$1,000	October-20	60002035
Covered CA Contact CalWIN System Availability -outage on 2/18; Deficiency Resolution Timeliness	CalWIN	February-20	\$59,000	September-20	60001619
Covered CA Contact CalWIN System Availability	CalWIN	March-20	\$24,250	October-20	60002035
Covered CA Contact CalWIN System Availability	CalWIN	September-20	\$1,000	October-20	60002035
Core CalWIN UAT Delivery, Deficiency Resolution, CalHEERS Response Time	CalWIN	April-20	\$5,500	October-20	60002035
Core CalWIN Deficiency Resolution, CalHEERS Deficiency Resolution and Response Time	CalWIN	May-20	\$5,500	October-20	60002035
Core CalWIN System Availability	CalWIN	June-20	\$5,265	Pending Clearance (Nov)	
C-IV Application Maintenance	C-IV	June-20	\$12,012	September-20	1100697154
LRS Daily Prime Business Hours Availability	LRS	October-20	\$5,000	Pending Clearance (Nov)	
<b>Total</b>			<b>\$118,527</b>		

## Hours & Credits

Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)
CalWIN Modernization ("Modification") Hours	\$3,559,632	\$1,450,674	\$5,010,306	\$8,217,460	\$3,207,154
CalWIN Business Intelligence (BI)	\$3,968,538	\$2,676	\$3,971,214	\$3,971,215	\$0
CalWIN IDMS	\$0	\$1,500,000	\$1,500,000	\$1,500,000	\$0
CalWIN Business Rules Engine (BRE)	\$0	\$3,500,000	\$3,500,000	\$3,500,000	\$0
C-IV Royalty Fees	\$600,006	\$0	\$600,006	\$600,006	\$0
<b>Total</b>	<b>\$8,128,176</b>	<b>\$6,453,350</b>	<b>\$14,581,526</b>	<b>\$17,788,681</b>	<b>\$3,207,154</b>

Modernization Hours are updated each August with 8,500 hours; includes hours from prior years (updated 8/6/20).

IDMS estimate of \$1.5M for potential utilization of hours for CalSAWS GA/GR.

BRE estimate of \$3.5M for potential utilization of hours for CalSAWS GA/GR.

Royalty fees includes \$200k shifted from SFY 18/19 and \$200K from SFY 20/21 in addition to SFY 19/20.



# Imaging Update and Demonstration

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## Imaging – CalSAWS Solution



### Planning

Feb 14 - Mar 13

### Design

Mar 2 - Oct 15

### Change Management

Apr 15 - Dec 31

### Build

Jun 1 - May 24

### System Tests

Sep 1 - Aug 31

### Performance Tests

Feb 14 - Jul 14

### Training (Design, Build, Test)

Jun 1 - Jun 18

### Early Training

Jul 1 - Oct 22

### Train the SME

Jul 20 - Sep 2

### General Training

Aug 20 - Nov 19

### UAT

Apr 1 - Aug 31

### CalWIN UAT

May 2 - Sep 30

**C-IV Go-Live Support**  
 Sep 27 - Oct 29

**LA Go-Live Support**  
 Nov 22 - Dec 31

**W1 Go-Live Support**  
 Oct 24 - Nov 24

**W2 Go-Live Support**  
 Feb 20 - Mar 24

**W3 Go-Live Support**  
 Apr 24 - May 26

**W4 Go-Live Support**  
 Jun 25 - Jul 28

**W5 Go-Live Support**  
 Aug 28 - Sep 29

**W6 Go-Live Support**  
 Oct 23 - Nov 24

**Legend**

- On schedule, performing as planned
- Potential delay/monitor with no material schedule impact
- Behind schedule and requires escalation
- State Activities
- County Activities (On schedule)

# Imaging Change Management Overview – C-IV and LA Counties

Imaging CM efforts will provide streamlined and relevant information to users and continuously update engagement strategies based on user feedback

## Support

### Change Network Champions

(CNCs) will support change efforts and champion the project, including raising project awareness, fostering commitment, and helping others embrace the solution

- C-IV CNCs and LA CNCs to be recruited separately
- C-IV CNCs identification complete
- C-IV CNC Orientation held October 28

Note: Primary Imaging Contacts (PICs) support the Imaging Document Migration efforts in collaboration with the Imaging Technical Team.

## Engagement

### Meetings

- C-IV and LA Counties to have separate meetings due to different Go-Live dates
  - ✓ **Change Network Meetings** to prepare CNCs to support counties
  - ✓ **Imaging Roadshows** to introduce Imaging Project
  - ✓ **Imaging Demonstrations** to provide an overview of functionality

### Communications

- Timely, consistent, and key messages to be distributed
- Communications to date:
  - ✓ C-IV Imaging Infographic distributed September 8
  - ✓ C-IV News Blast distributed October 26
  - ✓ C-IV Imaging Video development in progress

## Feedback

**Readiness Assessment Surveys** to evaluate end user readiness and inform engagement activities

- LA County will receive a survey that focuses on the Imaging project
- C-IV Counties receive surveys that combine Imaging specific questions with overall C-IV Migration to CalSAWS questions
  - ✓ C-IV T-12 Readiness Assessment Survey closed October 14

**Pulse Surveys** to measure effectiveness of and satisfaction with meetings

CNCs and RMs to provide input based on observations and discussions with staff

# Imaging Training Overview - C-IV and LA Counties

The Imaging Training Program focuses on equipping users with capabilities to operate within the new Imaging Solution

## Training Materials

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- All Imaging training materials to be leveraged for both C-IV and LA Imaging Users
- **Imaging Web-Based Trainings** (WBTs) – virtual instructions to include interactive lessons, progress checks, exercises, and assessments
  - ✓ 9 WBT topics identified and approved
  - ✓ General Design development and review cycle complete
  - ✓ Detailed Design development in progress
- **Imaging Job Aids** – documents to describe step-by-step processes of Imaging functionality
- **Imaging Online Help Pages** – to provide system navigation from page-to-page through the Imaging Solution
- **Imaging Training Guides** – supplemental training mediums to assist Imaging Users with specific Imaging functionalities

## Training Delivery

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### Early and General Training

- Imaging C-IV Early and General Training to be incorporated into C-IV Migration to CalSAWS Early and General Training
- **Early Training** – Select County-identified End Users to complete Imaging training in advances to learn key, new functionality
- **General Training** – County-identified End Users to complete Imaging training

### Imaging Train-the-SME (ITTSME)\*

- County-selected Imaging SMEs to attend sessions to deepen their understanding of the Imaging Solution beyond completion of Imaging WBTs; attendees to support Imaging Users upon Imaging Go Lives

\*ITTSME planning in progress

# Demo - Imaging Early View





# Procurement Update



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# Central Print Procurement

## Timeline

PROCUREMENT EVENT	DATE
Develop Requirements and RFP	January 21 – April 22, 2020
Consortium RFP Review and Approval	April 23 – May 5, 2020
State RFP Review and Approval	May 6 – July 6, 2020
Federal RFP Review and Approval	July 8, 2020
RFP Release	July 8, 2020
Bidder's Conference	July 16, 2020
Contractor Proposal Due Date	September 23, 2020
Evaluate Proposals and Prepare Vendor Selection Report	September 24 – December 21, 2020
Consortium Issues Notice of Intent to Award	December 22, 2020
Contract Negotiations	December 23 – 30, 2020
State, Federal and Consortium JPA Board of Directors Approval of Agreement	December 31, 2020 – March 26, 2021
Planned Start Date of Central Print Contractor	March 29, 2021



# Accenture Satisfaction Survey



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# Customer Satisfaction Survey

## Background

- The Customer Satisfaction Survey is a standardized, 8-question electronic survey that Accenture distributes to our customers to gather valuable feedback on the Accenture team's delivery and performance
  - Provides opportunity for the Accenture team to develop and implement action plans, if appropriate
- The intent of this upcoming survey is to gather feedback from the CalSAWS Consortium on the team's delivery, 1.5 years into the CalSAWS DD&I Project
- This survey would be the first for the CalSAWS Consortium

# Customer Satisfaction Survey

## Survey Details

- Distribution date: mid-December 2020 and will be open for 28 days
- Survey recipients:
  - Consortium Executive Team (e.g. Executive Director, Section Directors)
  - Members of the JPA Board of Directors
  - Members of the Project Steering Committee
- Recipients will receive an email invitation from *clientsat.accenture.com* with a unique link to the survey

# Customer Satisfaction Survey

## Survey Details

- Survey questions will include the following:
  1. How likely are you to recommend Accenture to others?
  2. How do you evaluate Accenture's overall performance?
  3. How well does Accenture bring transformational ideas and innovation to help your organization's overall performance?
  4. How do you evaluate Accenture's ability to translate ideas and innovation into tangible results for your organization?
  5. How well does Accenture deliver its services and "delivers what it promises?"
  6. How well are Accenture Leaders committed to your success and serving you as a trusted advisor?
  7. How satisfied are you with the ease of doing business with Accenture?
  8. As you consider Accenture's overall performance, do you have suggestions for better alignment between Accenture's contribution and your organizational priorities?

Adjourn Meeting

