Cal**SAWS** | JPA Board of Directors Meeting

February 19, 2021

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

Action Items

4. Pursuant to the JPA Agreement, Article III, Section 3.01, the Board of Directors shall elect from among its Directors, a Vice-Chair.

   a. Seek nominations and creation of a slate for Board of Directors Vice-Chair for the period of February 19, 2021 – June 30, 2021.

      i. Delfino Neira – Fresno County – Region 4

   b. Proceed to elect the Vice-Chair for the period of February 19, 2021 – June 30, 2021.

Action Items

5. Approval of Consent Items
    a. Approval of the Minutes and review of the Action Items from the January 22, 2021 joint meeting of the CalSAWS JPA Member Representatives and Board of Directors.
    b. Approval of Accenture LRS/CalSAWS Change Notice 8, which includes requests for:
        i. Los Angeles County DCFS IVR Call Flow Implementation Services
        ii. Continuum of Care Automation
        iii. Earned Income Disregard (EID)
        iv. Additional M&E Hours

Continues

Action Items

5. Approval of Consent Items (Continued)

    c. Approval of Accenture C-IV Allocation Request 1, which includes requests for:

        i. Los Angeles County DCFS IVR Call Flow Software

        ii. Earned Income Disregard (EID)

        iii. Additional Application Maintenance Hours

        iv. County Purchases for Alpine, Amador, Butte, Colusa, Del Norte, Humboldt, Imperial, Kings, Kern, Lake, Madera, Modoc, Mono, Mariposa, Merced, Napa, Plumas, Riverside, San Benito, San Bernardino, Shasta, Sierra, San Joaquin, Siskiyou, Stanislaus, Sutter, Trinity, and Tuolumne for various Services, Equipment, and Software items

Continues

Action Items

5. Approval of Consent Items (Continued)

    d. Approval of First Data LRS Quality Assurance Change Notice 2, which includes requests for:

        i. ABAWD
        ii. SB 1341
        iii. Testing Staff Augmentation

    e. Approval of Deloitte Change Order 2, which includes requests for:

        i. Updates to the Release and Timeline
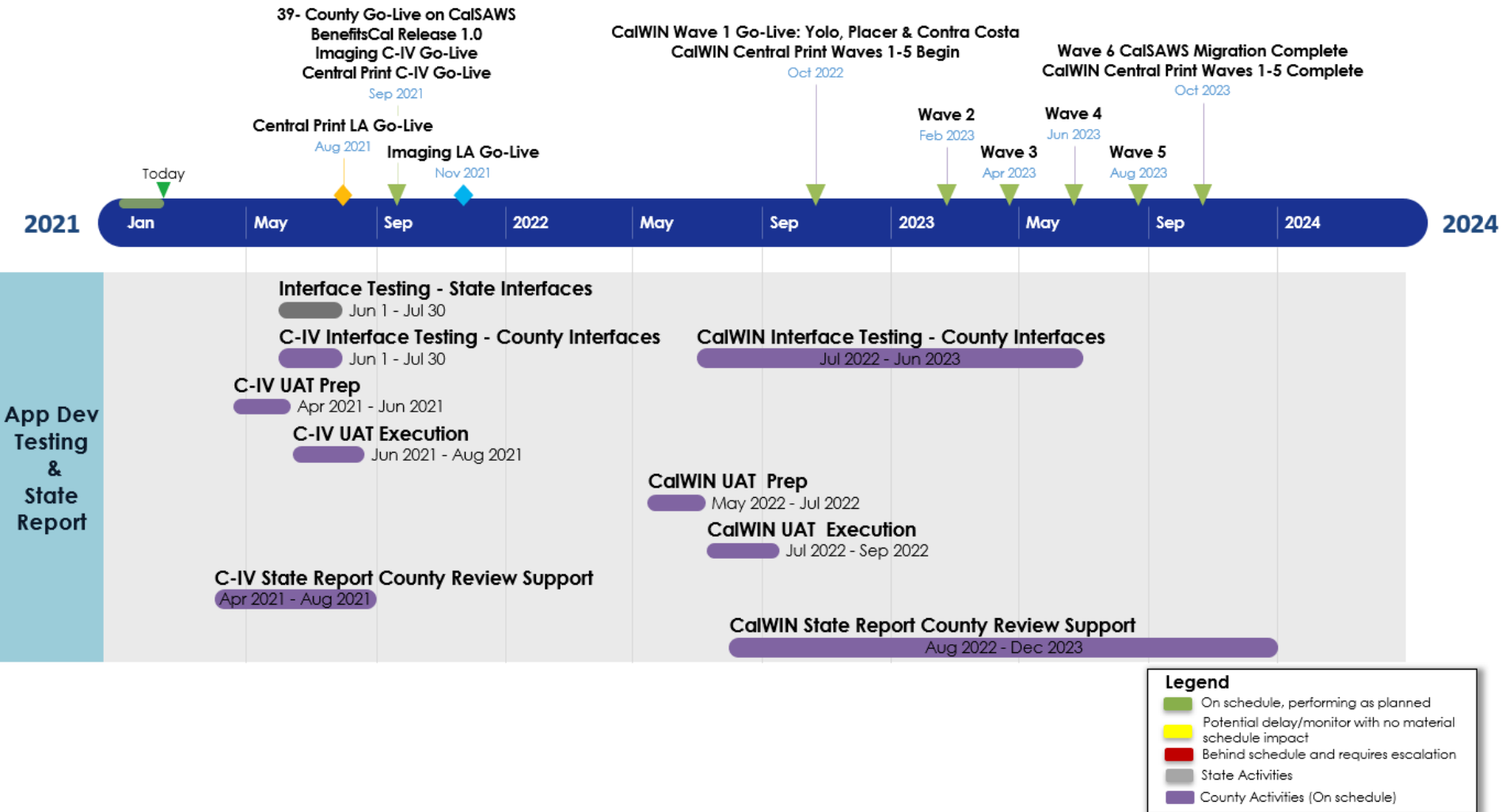
Continues

Informational Items
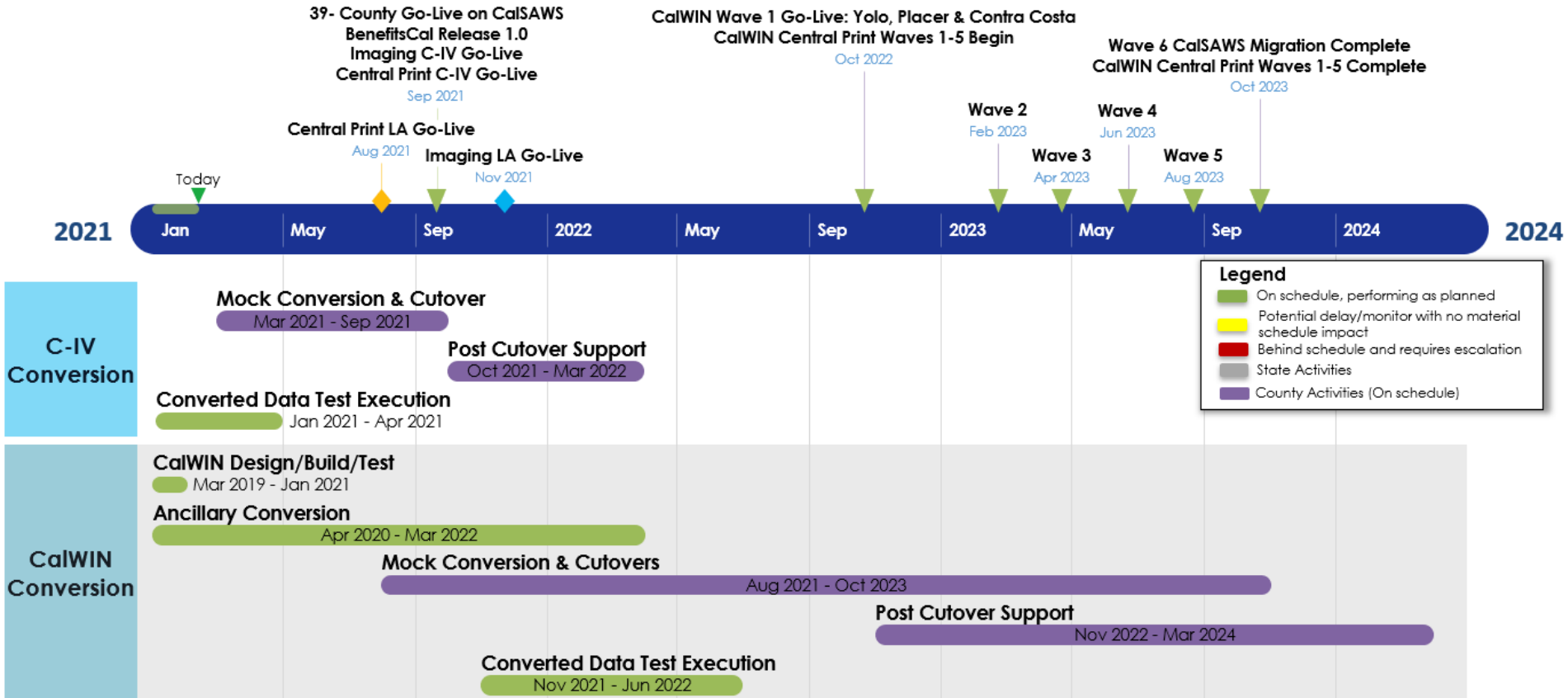
CalSAWS Gantt Chart Update

CalSAWS Project Gantt
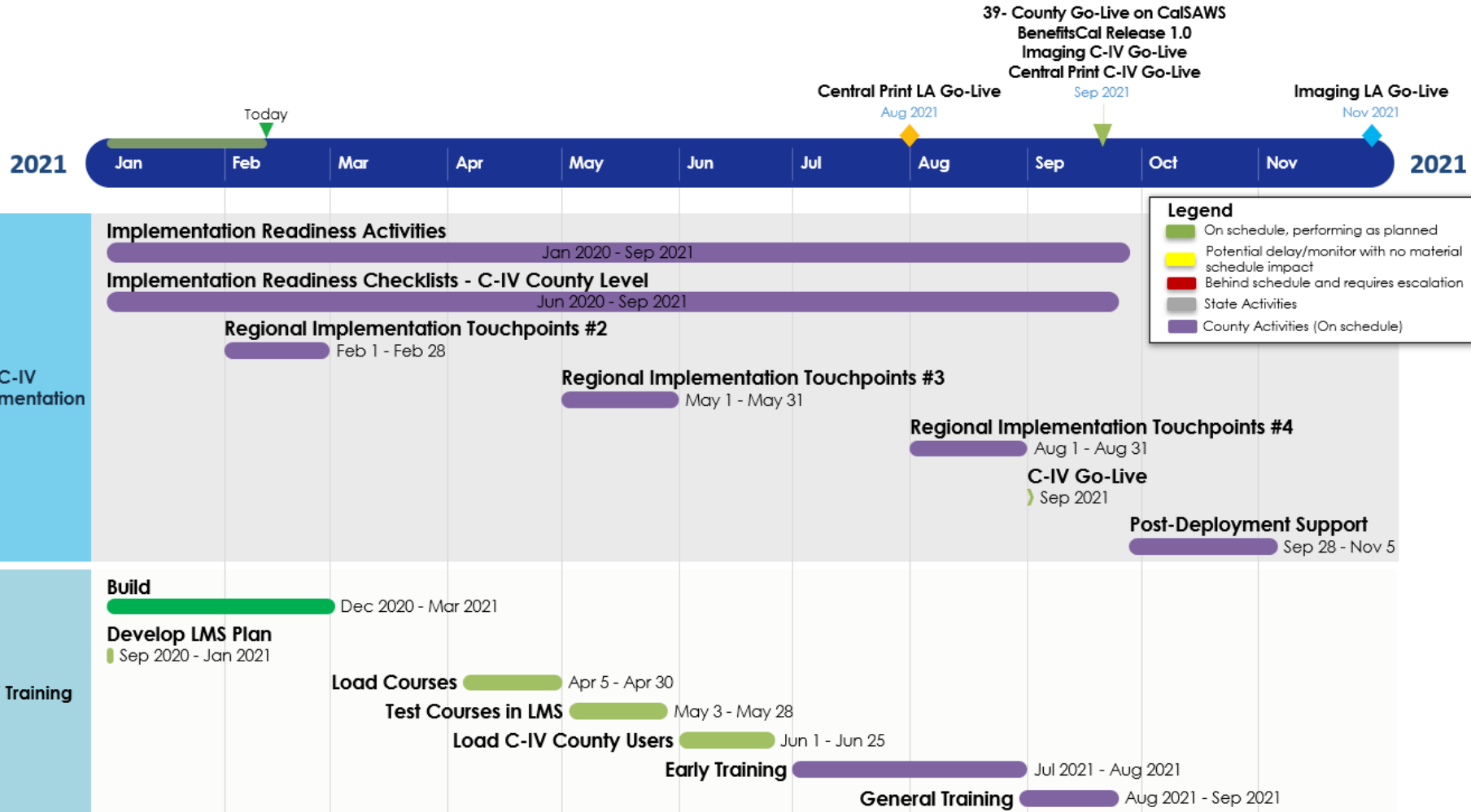
High Level Overview – App Dev & Test

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

CalWIN Wave 1 Go-Live: Yolo, Placer & Contra Costa
CalWIN Central Print Waves 1-5 Begin
Oct 2022

Wave 6 CalSAWS Migration Complete
CalWIN Central Print Waves 1-5 Complete
Oct 2023

Central Print LA Go-Live
Aug 2021

Imaging LA Go-Live
Nov 2021

Wave 2
Feb 2023

Wave 4
Jun 2023

Wave 3
Apr 2023

Wave 5
Aug 2023

Today

| 2021 | Jan | May | Sep | 2022 | May | Sep | 2023 | May | Sep | 2024 | 2024 |

App Dev Testing & State Report

Interface Testing - State Interfaces
Jun 1 - Jul 30

C-IV Interface Testing - County Interfaces
Jun 1 - Jul 30

CalWIN Interface Testing - County Interfaces
Jul 2022 - Jun 2023

C-IV UAT Prep
Apr 2021 - Jun 2021

C-IV UAT Execution
Jun 2021 - Aug 2021

CalWIN UAT Prep
May 2022 - Jul 2022

CalWIN UAT Execution
Jul 2022 - Sep 2022

C-IV State Report County Review Support
Apr 2021 - Aug 2021

CalWIN State Report County Review Support
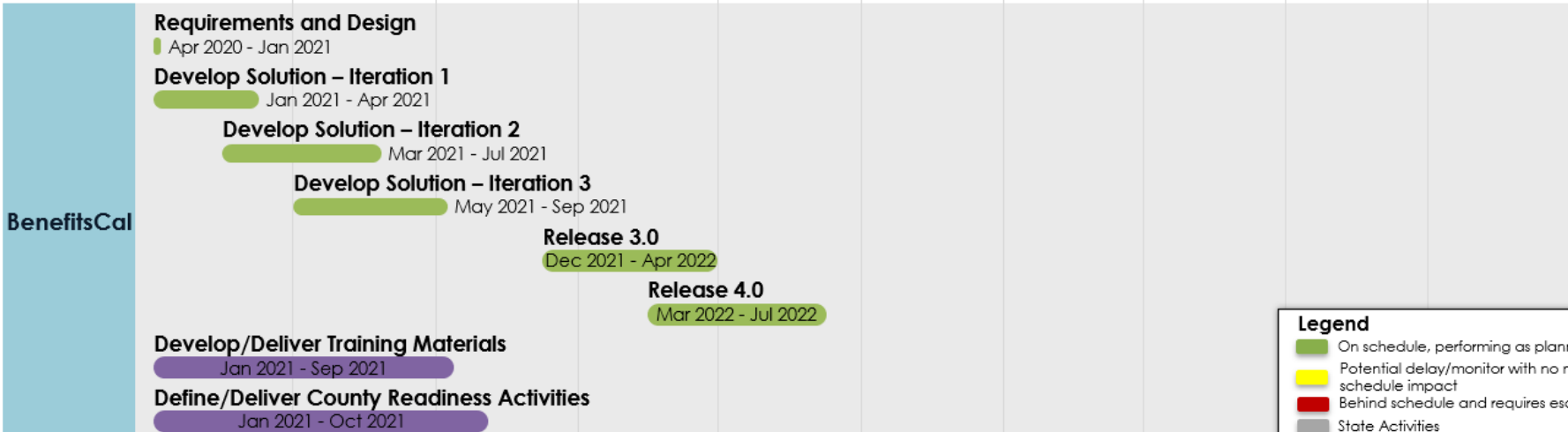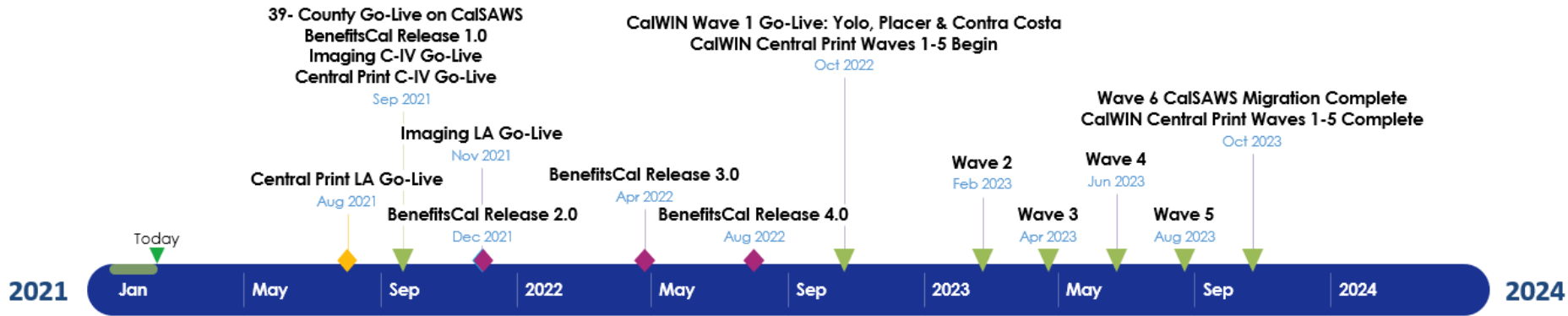Aug 2022 - Dec 2023

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)

CalSAWS Project Gantt

High Level Overview - Conversion

CalSAWS Project Gantt

High Level Overview – C-IV Implementation

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

Central Print LA Go-Live
Aug 2021

Imaging LA Go-Live
Nov 2021

Today

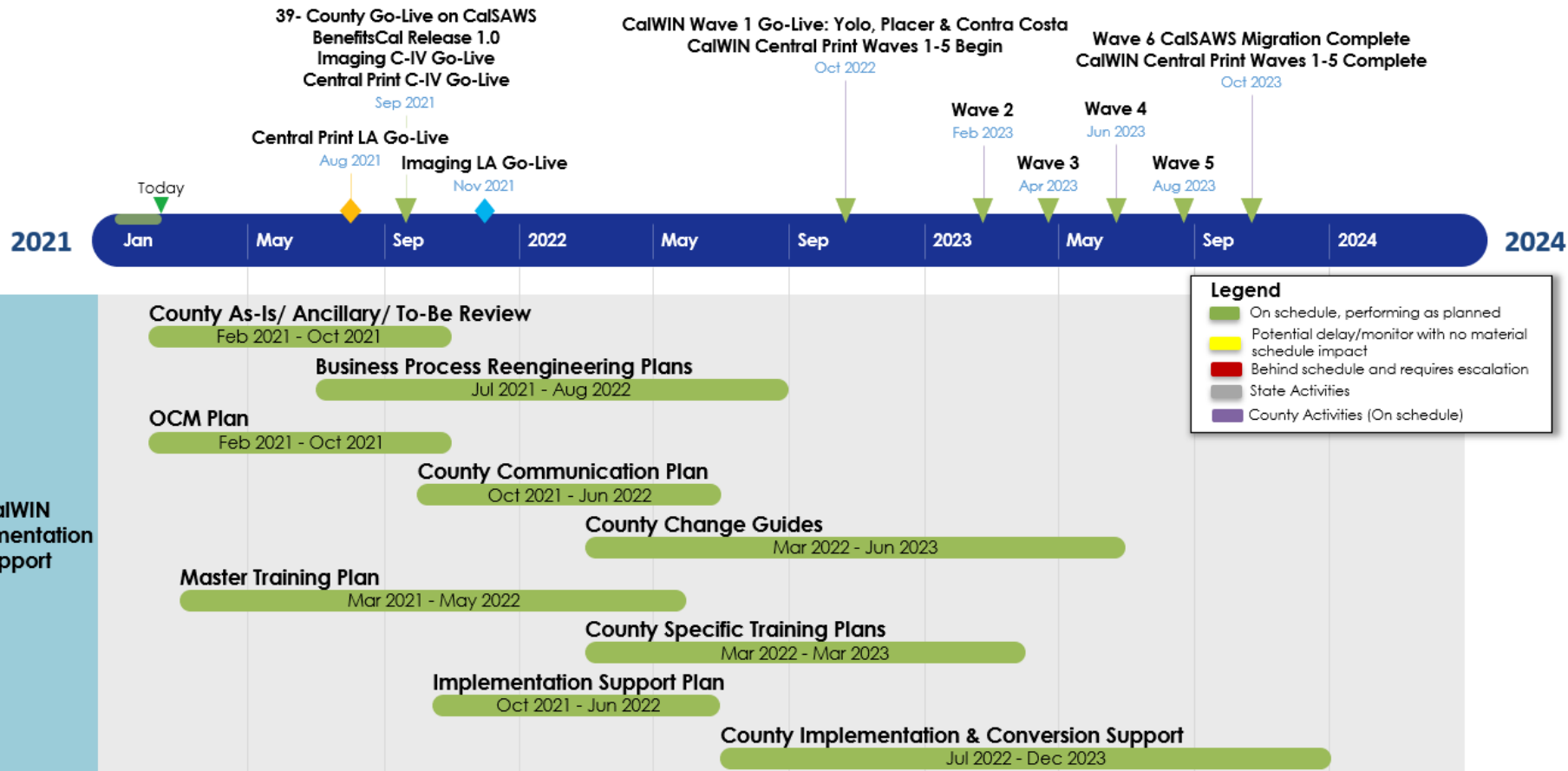| 2021 | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | 2021 |

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

C-IV Implementation

Implementation Readiness Activities
Jan 2020 - Sep 2021

Implementation Readiness Checklists - C-IV County Level
Jun 2020 - Sep 2021

Regional Implementation Touchpoints #2
Feb 1 - Feb 28

Regional Implementation Touchpoints #3
May 1 - May 31

Regional Implementation Touchpoints #4
Aug 1 - Aug 31

C-IV Go-Live
Sep 2021

Post-Deployment Support
Sep 28 - Nov 5

C-IV Training

Build
Dec 2020 - Mar 2021

Develop LMS Plan
Sep 2020 - Jan 2021

Load Courses
Apr 5 - Apr 30

Test Courses in LMS
May 3 - May 28

Load C-IV County Users
Jun 1 - Jun 25

Early Training
Jul 2021 - Aug 2021

General Training
Aug 2021 - Sep 2021

CalSAWS Project Gantt

High Level Overview – Imaging

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

Central Print LA Go-Live
Aug 2021

Imaging LA Go-Live
Nov 2021

CalWIN Wave 1 Go-Live: Yolo, Placer & Contra Costa
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Oct 2022

Wave 6 CalSAWS Migration Complete
CalWIN Central Print Waves 1-5 Complete
Oct 2023

Wave 2
Feb 2023

Wave 4
Jun 2023

Wave 3
Apr 2023

Wave 5
Aug 2023

Today

2021 — Jan | May | Sep | 2022 | May | Sep | 2023 | May | Sep | 2024 — **2024**

Imaging

Build
Jun 2020 - May 2021

System Test
Sep 2020 - Aug 2021

Performance Test
Feb 2021 - Jul 2023

C-IV and LA UAT
Apr 2021 - Aug 2021

CalWIN UAT
Apr 2022 - Sep 2022

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)

CalSAWS Project Gantt

High Level Overview - BenefitsCal

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

CalWIN Wave 1 Go-Live: Yolo, Placer & Contra Costa
CalWIN Central Print Waves 1-5 Begin
Oct 2022

Wave 6 CalSAWS Migration Complete
CalWIN Central Print Waves 1-5 Complete
Oct 2023

Imaging LA Go-Live
Nov 2021

Central Print LA Go-Live
Aug 2021

BenefitsCal Release 3.0
Apr 2022

Wave 2
Feb 2023

Wave 4
Jun 2023

BenefitsCal Release 2.0
Dec 2021

BenefitsCal Release 4.0
Aug 2022

Wave 3
Apr 2023

Wave 5
Aug 2023

Today

| 2021 | Jan | May | Sep | 2022 | May | Sep | 2023 | May | Sep | 2024 | 2024 |

BenefitsCal

Requirements and Design
Apr 2020 - Jan 2021

Develop Solution – Iteration 1
Jan 2021 - Apr 2021

Develop Solution – Iteration 2
Mar 2021 - Jul 2021

Develop Solution – Iteration 3
May 2021 - Sep 2021

Release 3.0
Dec 2021 - Apr 2022

Release 4.0
Mar 2022 - Jul 2022

Develop/Deliver Training Materials
Jan 2021 - Sep 2021

Define/Deliver County Readiness Activities
Jan 2021 - Oct 2021

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)

CalSAWS Project Gantt

High Level Overview – CalWIN Implementation Support

CalWIN Implementation Support Services

BPR As-Is Discovery Sessions Update

- CalWIN Counties completed As-Is Discovery Sessions last week to develop high-level Baseline processes for the 18 CalWIN Counties – over 100 staff attended each session

- Outputs for edits were sent to CalWIN Counties with request for feedback by 2/12/21

Wednesday 1/27	Tuesday 2/2	Wednesday 2/3	Thursday 2/4

• Review of IndustryPrint Tool
• Process Types (e.g. Operations, Support Functions)
• Process Groups (e.g. Application Registration)
• Processes (e.g. Benefit Issuance)
	• Review of IndustryPrint Tool/Recap of Last Session
	• Process Reviews for:
	  • Application Registration/Intake
		• Review of IndustryPrint Tool/Recap of Last Session
		• Process Reviews for:
		  • Case Management
		  • RRRs
			• Review of IndustryPrint Tool/Recap of Last Session
			• Process Reviews for:
			  • Fraud
			  • Appeals/Hearings

Up Next: County-Specific As-Is Discovery Sessions

County Virtual Visits will include As-Is Discovery Workshops and targeted interviews with identified employees, starting February 22nd

Sample Calendar for February – April week-long sessions for each County

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	Kick-off & Overview of Approach	Intake/ Application Registration	Maintenance	Operations- Lobby, Task, Call Center	Imaging, Help Desk
	Break	Break	Break	Break	Break
PM	Intake/ Application Registration	Maintenance	Case Load Management	QA/QC, Collections/ Benefit Recovery, Hearing	Reporting, Administration/ Finance

Training Advisory Council Update

- **CalWIN Counties have assigned representatives who have been invited to the Kick-Off Meeting**

- **TAC Kick-Off Meeting met on February 17**
  - Discussion about the purpose & objectives of TAC
  - An overview of the training approach will be presented

- **Training Advisory Council continues monthly to provide guidance for the CalWIN training approach**

Change Management Update

- Visioning Lab (February 24) - Senior leadership commitment increases [employee engagement](#)and adoption of changes; this is an interactive opportunity to connect and align on a [unified vision](#)on what Implementation **success** means for CalWIN migration

- Outcomes of the Visioning Lab will be shared out

- Organizational Change Management Kickoff presentation will be held on February 25th at the OPAC meeting

BenefitsCal Update

What is Search Engine Optimization (SEO)?
What it is, why it matters

Search engine optimization is the practice of optimizing a website for the search engine, without paying for advertisements, to enable the website to rank higher on a Search Engine Results Page.

Paid Search Ad

SEO Listing

Why does this matter? The easier it is to find the right content (the BenefitsCal website, program information), the faster we can serve the residents of California.

Research indicates there are SEO opportunities

Customer and Data Research

1

Customer Research: Today, customers learn about portals through Caseworkers, instead of through web searches.
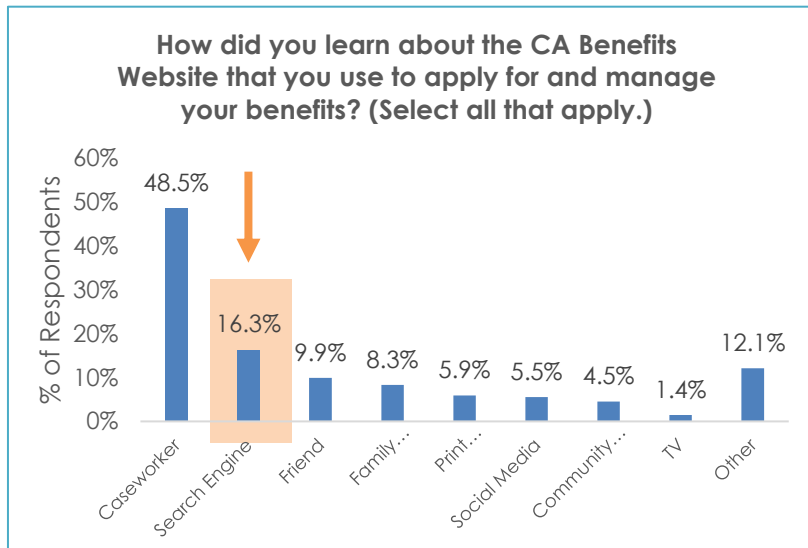
Above, results from our survey of 7,000+ customers. Of those who use a CA Benefits Website to apply for benefits, the second-best way that respondents found out about the CA Benefits Website was through a Search Engine (e.g., Google). Optimizing the search engine experience for BenefitsCal is needed.

2

Data Research: A review of portal traffic revealed a drop in the ability to locate portals through online searches.
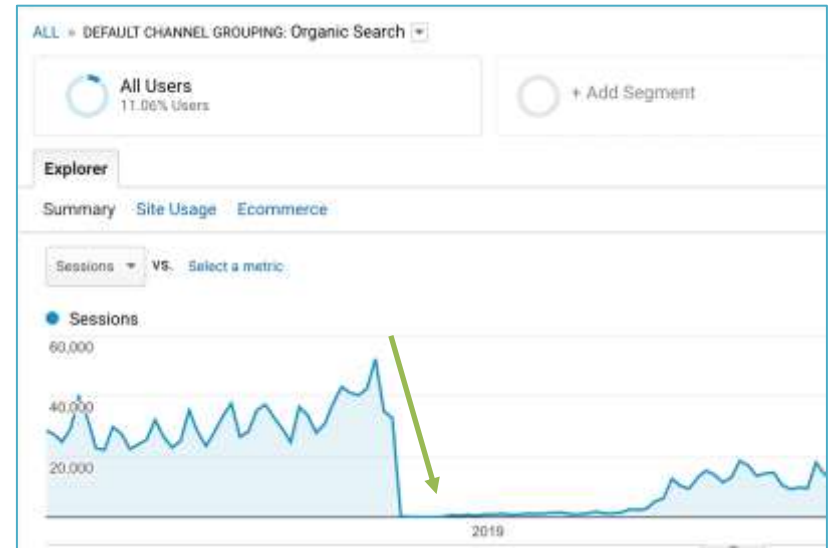
Above, organic traffic on a portal, with a drop in traffic from which the site never fully recovered.

Next Steps

Finding: Based on the research, the project team identified a number of opportunities to improve the ability to find the BenefitsCal through online searches.

Let us show you some of the steps we will take to make it easy to find the new BenefitsCal.

Insight: Leverage ecosystem relationships to create backlinks to the site

Finding

High-quality, natural links to a site act like "votes" for that site's authority to search engines (such as Google and Bing) and BenefitsCal is part of a rich network of high-quality sites from which it can request natural backlinks.

Action Plan

Leverage ecosystem relationships to ask sites to update links from existing portal sites to the new BenefitsCal website.

This could include the following:

- Federal/State Websites
- County Websites
- Partner Websites (United Way, GetCalFresh, others)
- Other Websites (Universities, others)

Above, examples of high-authority sites that BenefitsCal has relationships with and from which we can request backlinks.

Insight: 301 redirect from existing portals to the BenefitsCal website

Finding

We know a complete SEO site migration is critical to site relaunches. Applying 301 redirects (redirect old URL to its new URL site) will prevent losses in search traffic.

Action Plan

Complete SEO site migrations on all current portals when they are replaced with BenefitsCal. The project team should refer to the redirect mapping checklist for help and consider bringing in additional SEO support during migration periods. The team should also plan, as part of migration best practice, to monitor post-launch performance to flag any major issues.
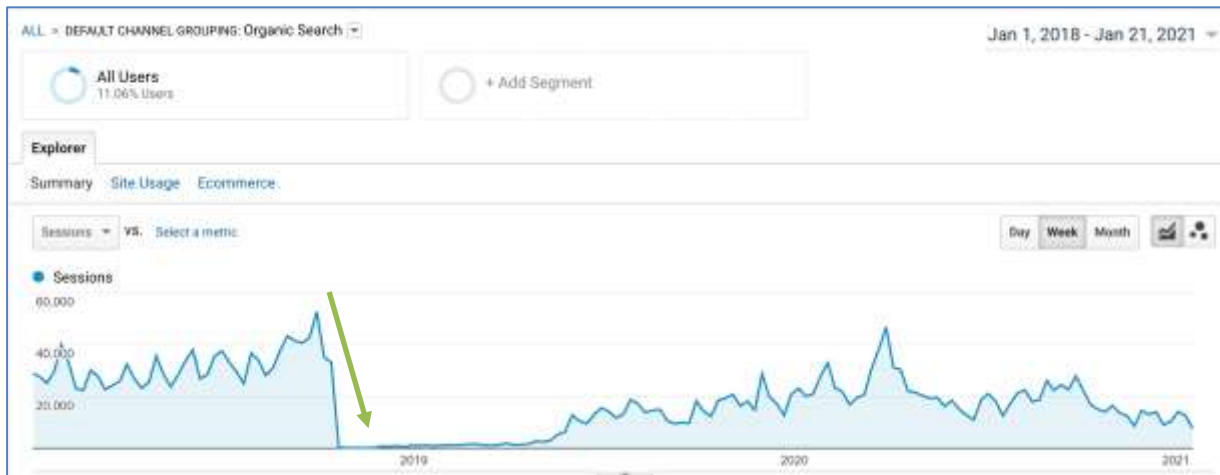
Above, organic traffic on a portal with a drop in traffic mid-October 2018 from which the site continues to have lower traffic than historical performance.

# **Insight:** Expose new user relevant content to the search engine

Finding

To appear in search results, search engines (such as Google or Bing) need BenefitsCal pages to return and display. Additional content (like FAQ and Help pages) provides additional opportunities for users to find and enter the site.

Action Plan

Expose additional content to search (for example, general questions and FAQ content), to unauthenticated users.

If there are specific topics of interest (for example, Covid-19 related service updates) consider creating new, unauthenticated content pages to compete for those specific topics.
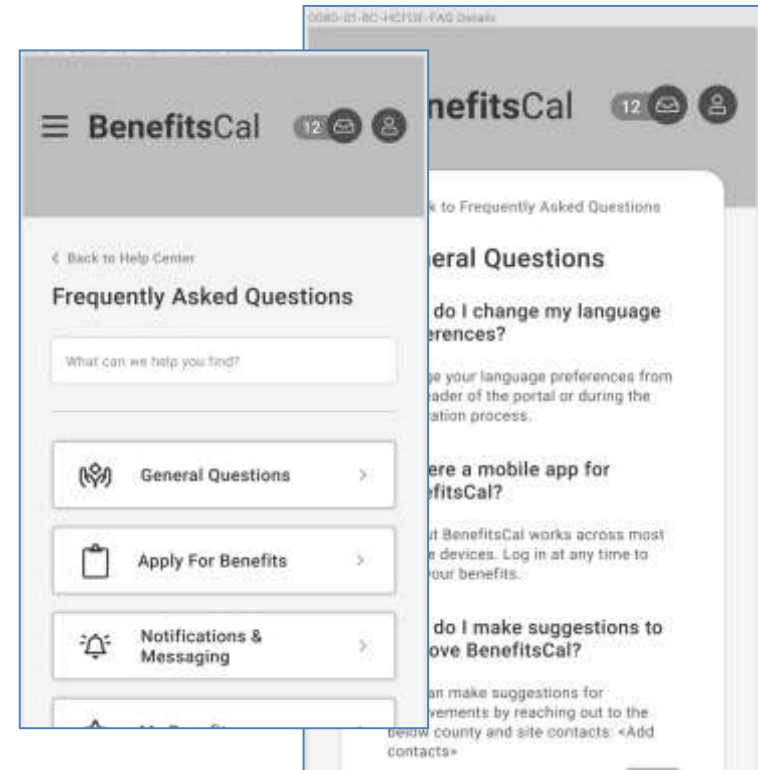
Above, current FAQ screens within BenefitsCal.

Insight: Help Search Engines to redirect users to BenefitsCal
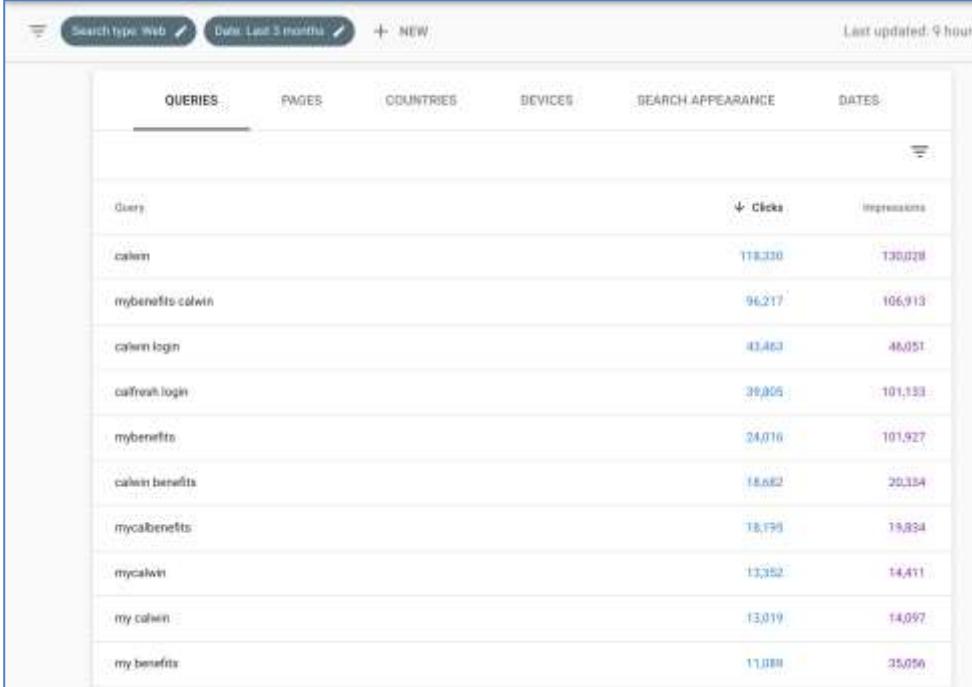
Finding

Within the current benefit portals, a significant number of people find the portals by searching directly for portal names (referred to as high branded click volume).

Action Plan

Weave in the existing portal names within the BenefitsCal homepage (not just within a JavaScript banner), to indicate relevancy.

This way, when users search for existing portal names (like "MyBenefits CalWIN"), the search will return and direct the user to the BenefitsCal portal.

Above, click volume to specific keywords on MyBenefits CalWIN, as recorded by Google Search Console. A majority are for brand-specific searches.

Metrics for C-IV Implementation Readiness

Pathway to Green Light

Counties will play an active role in being informed and participating in Operational Readiness Activities

- The Operational Readiness Approach includes documentation of the readiness of the efforts. The readiness reports will be consistently maintained, reported monthly up through the go/no-go green light decision.
- The decision to deploy to Production, also known as the "Green Light" or "Go/No-Go Decision," will be made collectively for all CalSAWS efforts approaching the September 2021 Go-Live
- Project Teams will begin reporting on the readiness of their respective projects through a monthly reporting process.

Ongoing Engagement with County IPOCs on Implementation tracking

Monthly Operational Readiness Status Discussions

Go/No-Go Official Readiness Reviews

Final Green Light Approval

*IPOC – Implementation Point of Contact

Implementation Readiness

Key Measurement Areas

Operational readiness reporting will be data-driven based on measurable metrics, consistent across efforts:

- Key to successful delivery of the CalSAWS Portfolio Implementation
- Outcomes must be successful, traceable, and validated
- Must meet exit criteria

Application Readiness

Technical Readiness • System Performance • Security

Conversion Readiness

Implementation Readiness

Change Readiness

Training Readiness

Metrics for CalSAWS Portfolio Readiness

Purpose of this Presentation

Provide a summary of the readiness areas that each effort will track and report

Introduce the Implementation Readiness Packet

Discuss the Pathway for the C-IV Counties to migrate to CalSAWS

Portfolio Readiness Dashboard

Template Example

Readiness Area	Current Period	Previous Period	C-IV Migration Measures	Beneficial Measures	Discussion
Application Readiness	🟢	🟢	20 of 45 milestones are complete – 44%	xx%: xx of xx measures complete	
Technical Readiness	🟢	🟢	27 of 33 milestones are complete – xx%	xx%: xx of xx measures complete	
Conversion Readiness	🟢	🟢	13 of 17 milestones are complete – 76%	xx%: xx of xx measures complete	
Implementation Readiness	🟢	🟢	3 of 3 milestones are complete – 100%	xx%: xx of xx measures complete	
Change Readiness	🟢	🟢	1 of 1 milestones are complete – 100%	xx%: xx of xx measures complete	
Training Readiness	🟢	🟢	3 of 11 milestones are complete – 27%	xx%: xx of xx measures complete	

🟢 All milestones are on-track and on-schedule
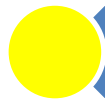
🟡 At least one milestone is at least two weeks behind; or at recommendation of CalSAWS Project Team or impacted County

🔴 At least one milestone more than two weeks behind; or at recommendation of CalSAWS Project Team or impacted County

Example – not real data

Project Readiness Dashboard

Template Example

Area	Categories	Status		% Complete	Notes
		Current Period	Previous Period		
Application	Design	C	G	Xx% Complete, xx of xx approved	
	Development	G	NS	Xx% complete, with xx of xx delivered	
	System Test	G	NS	Xx% complete, with xx of xx delivered	
	User Acceptance Test	NS	NS	Xx% complete, with xx of xx delivered	
	Interface Test	G	NS	Xx% complete, with xx of xx delivered	
Technical	Infrastructure	NS	NS	Xx% complete, with xx of xx delivered	
	Security Testing	NS	NS	Xx% complete, with xx of xx delivered	
	Performance Testing	NS	NS	Xx% complete, with xx of xx delivered	
Conversion	Converted Data Test	NS	NS	Xx% complete, with xx of xx delivered	
	Mock Runs	NS	NS	Xx% complete, with xx of xx delivered	
Implementation	Service Desk	NS	NS	Xx% complete, with xx of xx delivered	
	System Operations	NS	NS	Xx% complete, with xx of xx delivered	
	Pilot Deployment Plans	NS	NS	Xx% complete, with xx of xx delivered	
Change	Communications	NS	NS	Xx% complete, with xx of xx delivered	
	County Readiness	NS	NS	Xx% complete, with xx of xx delivered	
Training	Training Readiness	NS	NS	Xx% complete, with xx of xx delivered	

Project Status	G	On Track	Y	< 2 Weeks Late	R	> 2 Weeks Late	C	Complete	NS	Not Started

Example – not real data

Example: Overdue Milestones

Severity	Overdue Milestones
Critical	0
High	1
Medium	2
Low	0
Grand Total	**3**

Overdue Milestone Details

No.	Milestone #	Milestone Summary	Milestone Severity	Milestone Status	Count(ies) Impacted	Impact	Risk Mitigation
1.	CI - XXXXX	Description of a potential Milestone that is outstanding	High	Open	[County]	Description of the outstanding Milestone's impact on County Go-Live.	Explanation of the mitigation strategy and the expectation of when the Milestone will be completed.
2.	CI - XXXXX	Description of a potential Milestone that is outstanding	Medium	Open	[County]	Description of the outstanding Milestone's impact on County Go-Live.	Explanation of the mitigation strategy and the expectation of when the Milestone will be completed.
3.	CI - XXXXX	Description of a potential Milestone that is outstanding	Medium	Open	[County]	Description of the outstanding Milestone's impact on County Go-Live.	Explanation of the mitigation strategy and the expectation of when the Milestone will be completed.

Implementation Readiness Packet
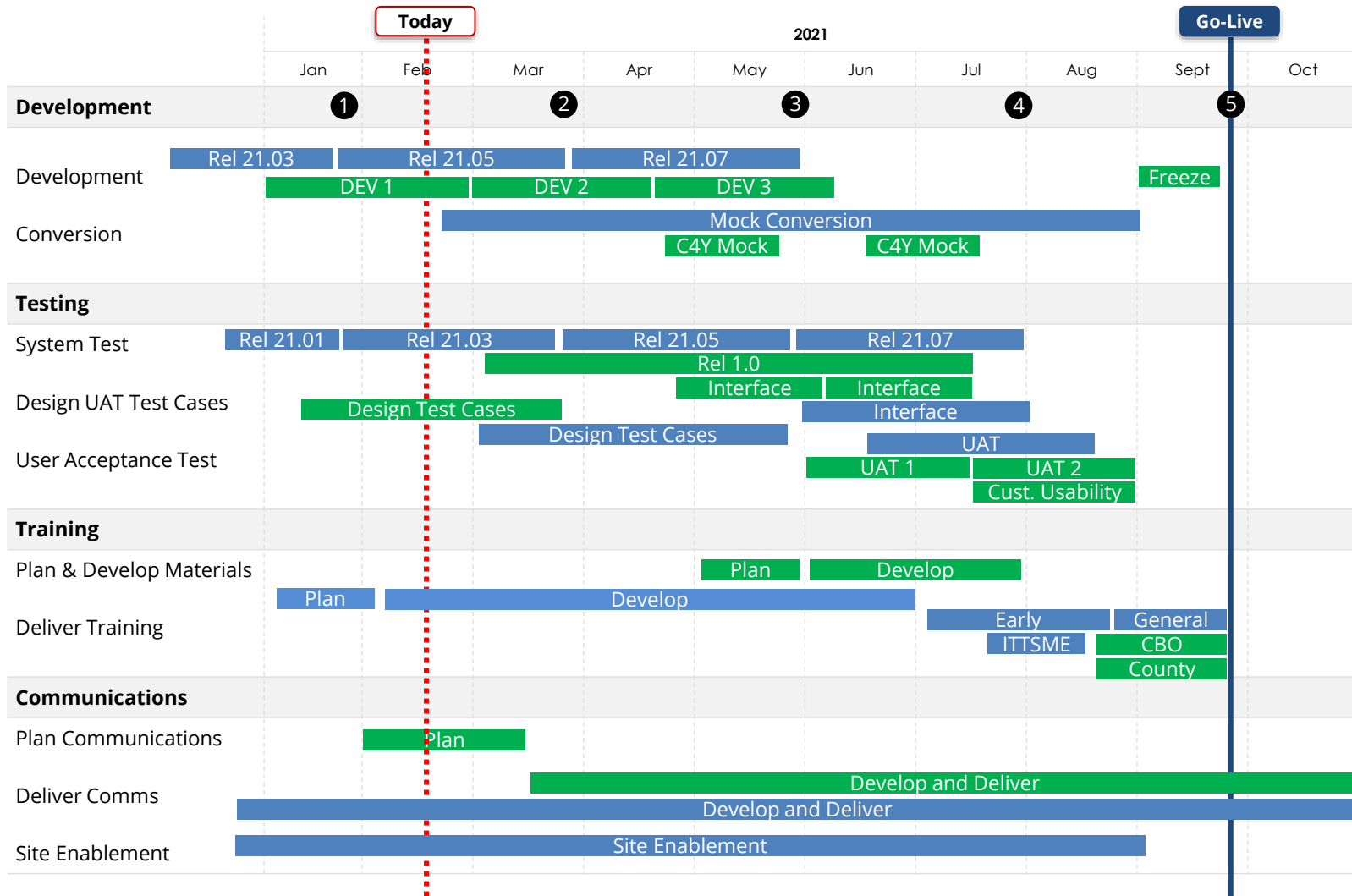## Summary of Readiness Metrics

On a monthly basis, the CalSAWS and BenefitsCal Projects will publish the **Implementation Readiness Packet** that contains a summary of operational readiness metrics and status.

Implementation Readiness Packet

- **Purpose** – To provide Counties with information related to the operational readiness of projects within CalSAWS Portfolio, including the C-IV Migration and BenefitsCal projects. Status will include key metrics related to the overall "health" of the Implementation effort based on measurable metrics and milestones.
- **Intended Audience** – County Directors, PPOCs, and IPOCs
- **Notification Method** – CalSAWS Information Transmittal (CIT)
- **Location** – CalSAWS Web Portal
- **Publish Frequency** – Monthly
- **Format** – PDF

Portfolio Readiness Timeline

BenefitsCal + C-IV Migration

Today | **2021** | **Go-Live**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct
Development	①		②		③		④		⑤	

Development
- Rel 21.03 | Rel 21.05 | Rel 21.07 | Freeze
- DEV 1 | DEV 2 | DEV 3

Conversion
- Mock Conversion
- C4Y Mock | C4Y Mock

Testing

System Test
- Rel 21.01 | Rel 21.03 | Rel 21.05 | Rel 21.07
- Rel 1.0
- Interface | Interface

Design UAT Test Cases
- Design Test Cases
- Interface
- Design Test Cases

User Acceptance Test
- UAT
- UAT 1 | UAT 2
- Cust. Usability

Training

Plan & Develop Materials
- Plan | Develop

Deliver Training
- Plan | Develop
- Early | General
- ITTSME | CBO
- County

Communications

Plan Communications
- Plan

Deliver Comms
- Develop and Deliver
- Develop and Deliver

Site Enablement
- Site Enablement

Legend

BenefitsCal
C-IV Migration

Releases
① Rel 21.01
② Rel 21.03
③ Rel 21.05
④ Rel 21.07
⑤ BenefitsCal + C-IV

Contingency Plans for Go-live

Contingency and Continuity Planning Spans Pre-Cutover Through Post-Implementation

BenefitsCal   **CalSAWS**

Pre-Cutover	Cutover	Post-Cutover	Post-Implementation
Period leading up to go-live	Go-live to the end of planned cutover activities including conversion	48 hours after cutover	90 days after cutover

Are we ready?   **Can we move forward?**   **Can we continue?**

What Could Trigger Pre-Cutover Contingency Plan Execution…

Conversion

Training Completion

Outreach Readiness

Organizational Readiness

Are We Ready?

Platform Readiness

Integration Readiness

Operational Readiness
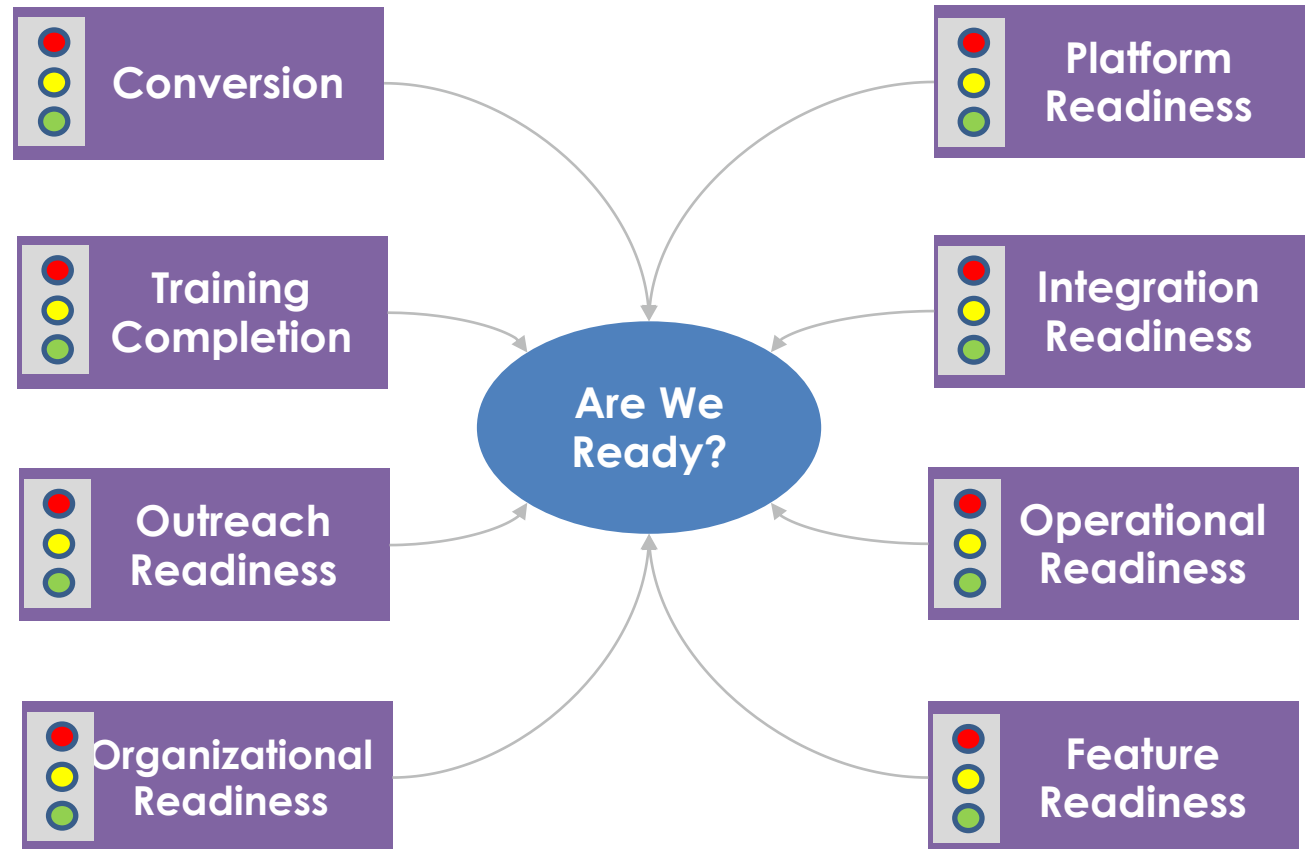
Feature Readiness

Note: Feature, Platform and Integration Readiness include health and performance

Potential Cause of Challenge (PCOC):
01 Platform Readiness

ID	Feature Readiness			Contingency Plan
	Critical / Must-Have Ready	Important Ready	Nice-to-Have Ready	
1	BenefitsCal Platform Readiness			**Contingency Scenario 01 – Performance Related Time-Out Errors** If there are time-out errors related to system performance that would impact the customer experience, or would prevent customers from completing key activities (for example: application submission, document upload), then the following actions will be taken: **Contingency Actions** 1. Evaluate impact (system-wide vs targeted areas) 2. Facilitate an all-hands call to assess the performance defects, to confirm the root cause is known and validated 3. Assemble a dedicated strike team of developers and testers to resolve and retest in rapid, continuous motion 4. Evaluate potential schedule impact **Contingency Plan Development Trigger Event/Date** If the resolution of the performance-related time-out errors is behind schedule more than two weeks from the planned resolution date (one test sprint), detailed contingency planning will commence. **Contingency Plan Execution Trigger Event/Date** If the resolution of the performance-related time-out errors is not ready for UAT validation by 08/06/21, four weeks prior to UAT exit, then the contingency plan will be executed. **Resolution Time to Complete Contingency** TBD based on specific finding **Impacts of Contingency Execution** TBD – This will include impacts to time, cost, resources, etc.
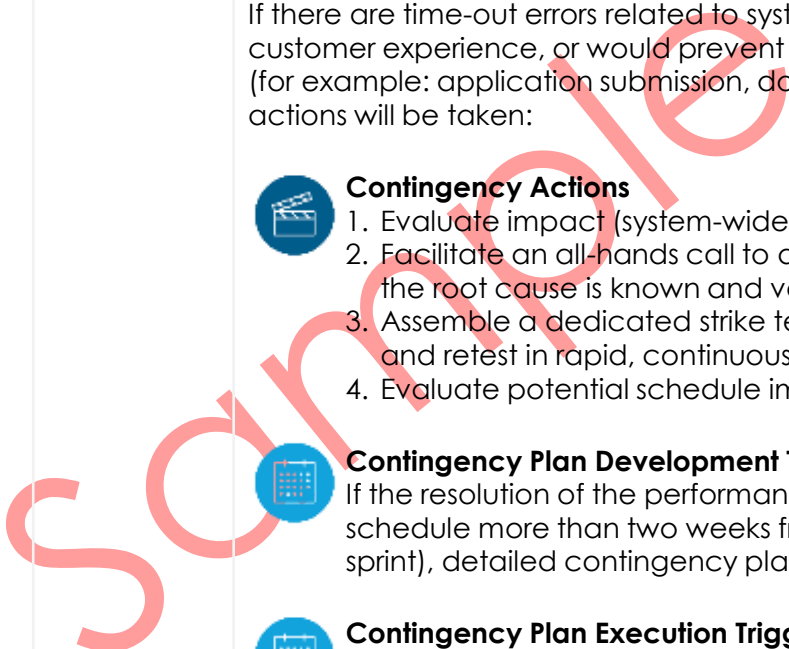
Potential Cause of Challenge (PCOC): 02 CalSAWS Interface Readiness

ID	Feature Readiness			Contingency Plan
	Critical / Must-Have Ready	Important Ready	Nice-to-Have Ready	
1	Interface Readiness			**Contingency Scenario 02 – CalSAWS APIs Not Ready** If the development of CalSAWS/BenefitsCal APIs is behind schedule, or significant defects are discovered within initial integration testing, then the following actions will be taken: **Contingency Actions** 1. Evaluate impact (within a core or ancillary business process) 2. Facilitate a cross-team call to assess the impact to both the CalSAWS and BenefitsCal timelines, and to identify mitigation options to recover 3. Evaluate potential quality and schedule impacts **Contingency Plan Development Trigger Event/Date** If the API development is behind schedule by more than two weeks from plan, or if the number of critical defects would delay the planned SIT and UAT sprint plans, detailed contingency planning will commence. **Contingency Plan Execution Trigger Event/Date** If the API development is not completed by the baselined/planned date, or if there are critical defects that are not resolved within one test sprint (two weeks), then the contingency plan will be executed. **Resolution Time to Complete Contingency** TBD based on specific finding **Impacts of Contingency Execution** TBD – This will include impacts to time, cost, resources, etc.

Potential Cause of Challenge (PCOC):
03 ForgeRock Interface Readiness

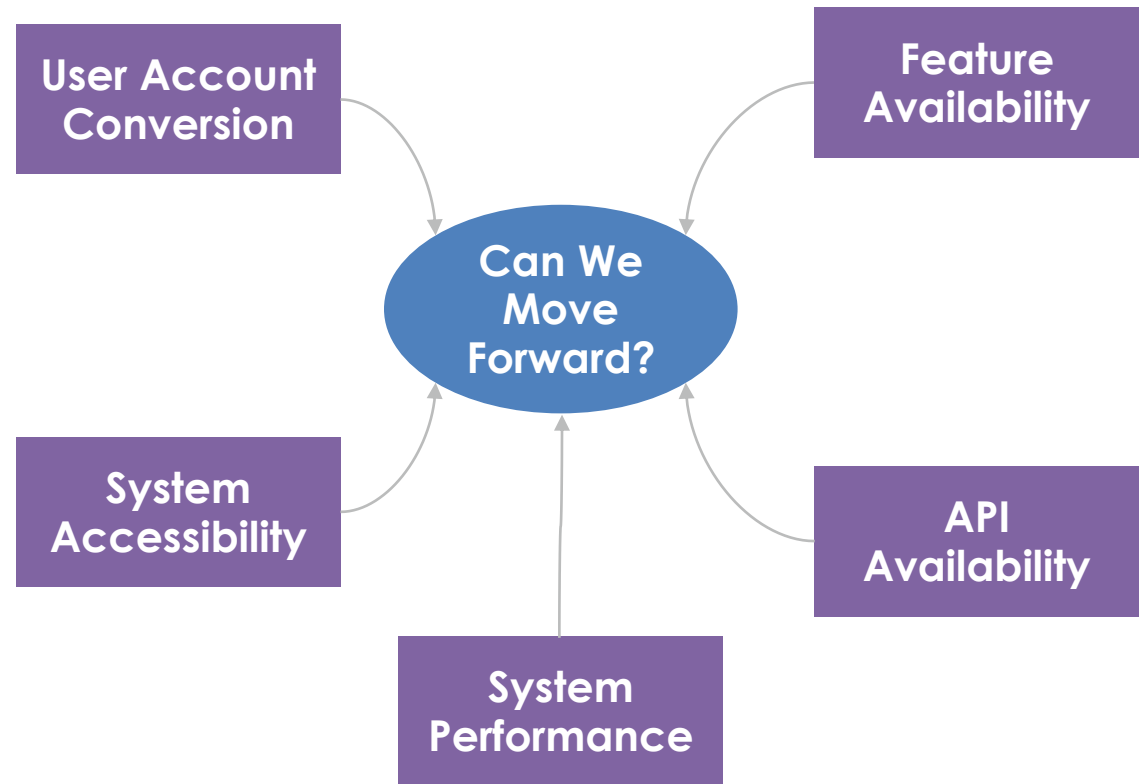| ID	Feature Readiness			Contingency Plan
	Critical / Must-Have Ready	Important Ready	Nice-to-Have Ready	
1	ForgeRock Interface Readiness			**Contingency Scenario 03 – API Interface with ForgeRock Not Ready** If the significant defects are discovered that would prevent a customer from logging into the BenefitsCal system as a result of ForgeRock integration issues, then the following actions will be taken: **Contingency Actions** 1. Facilitate a cross-team call with the ForgeRock team to assess the security defects, to confirm that the root cause is known and validated 2. Assemble a dedicated strike team of developers and testers to resolve and retest in rapid, continuous motion 3. Evaluate potential schedule impacts **Contingency Plan Development Trigger Event/Date** If the resolution of the login-related defects is behind schedule by more than two weeks from the planned resolution date (one test sprint), detailed contingency planning will commence **Contingency Plan Execution Trigger Event/Date** If the login function does not pass testing by 04/30/21 (the first week of SIT Increment 2), then the contingency plan will be executed. **Resolution Time to Complete Contingency** TBD based on specific finding **Impacts of Contingency Execution** TBD – This will include impacts to time, cost, resources, etc.
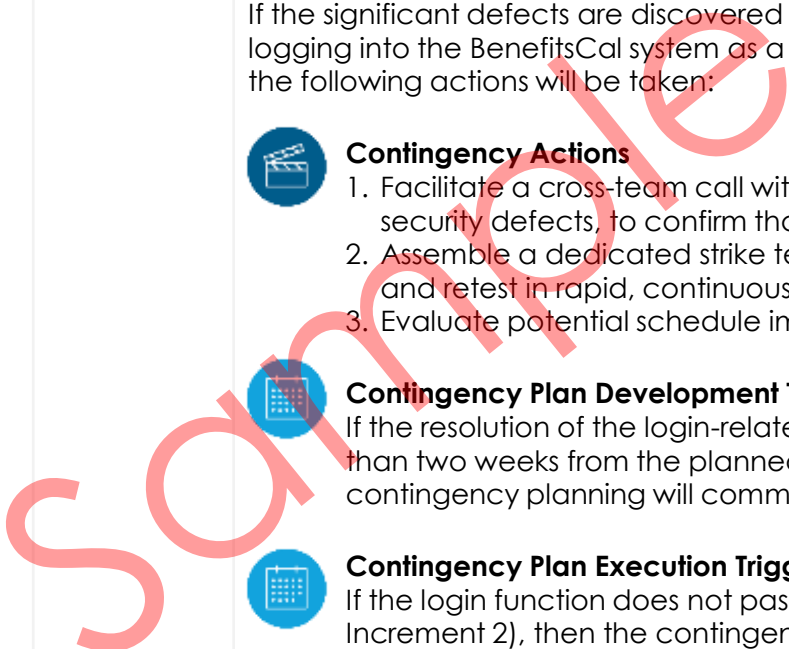
What Could Trigger Cutover and Post-Cutover Contingency Plan Execution…

User Account Conversion

Feature Availability

Can We Move Forward?

System Accessibility

API Availability

System Performance

Considerations

Alternative Access Channel Capacity/ Availability

Resolution Time

Impact (Customer/ Business/CBO)

What Could Trigger Post-Implementation Continuity Plan Execution…
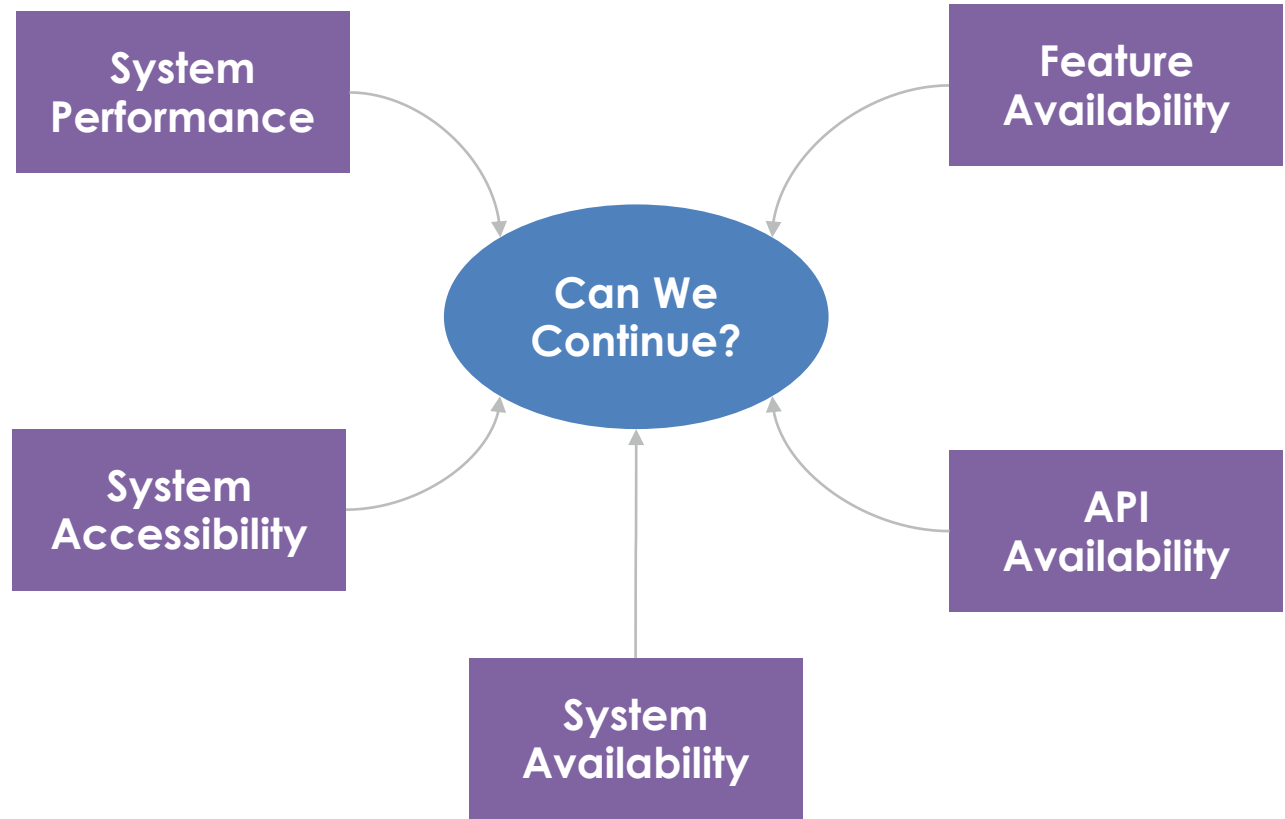
System Performance

Feature Availability

Can We Continue?

System Accessibility

API Availability

System Availability

Considerations

Alternative Access Channel Capacity/ Availability

Resolution Time

Impact (Customer/ Business/CBO)

Plans for Integrated User Acceptance Testing

C-IV UAT Update

Single UAT Web Portal

- Single Web Portal for all county UAT participants:
  - Daily messages and communications
  - Single, Unified, Daily meeting schedule
  - Access test scenarios
  - Access test assignments
  - Test environment assignment
  - Support person/team and Zoom link(s)
  - Log findings
  - Re-test defects
  - Access help videos and guides
- Single support process for all UAT testers

C-IV UAT Update
High-Level UAT County Participation Timeline

Key County Participation dates

2/8/2021
*UAT Recruitment
CIT Distributed
CRFI Distributed

3/15/2021
* UAT Test Scenario
Kick-Off
Training

4/19/2021
Test Scenarios
Delivered

5/24/2021
*UAT Test Execution
Kick-Off

September 2021
C-IV Go-Live

3/15/2021 - 4/18/2021
Pre-view Designs
& Test Scenarios (flow)

4/19/2021 - 5/21/2021
County Scenario Review
Scenario's Finalized

6/1/2021 - 9/3/2021
UAT Execution

**Preparation
02/01/21-05/28/21**

**Execution
6/1/21-9/3/21**

2 February 2021

3 September 2021

* Activity happening the week of

C-IV UAT Update
High-Level UAT Execution Timeline

C-IV UAT Execution is Scheduled for Jun 1 – Sep 3, 2021

June 2021

SUN	MON	TUE	WED	THUR	FRI	SAT
30	31 Holiday	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

July 2021

SUN	MON	TUE	WED	THUR	FRI	SAT
				1	2	3
4	5 Holiday	6	7	8	9	10
11	12	13	16	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August 2021

SUN	MON	TUE	WED	THUR	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

- BenefitsCal-Only UAT
- CalSAWS Application, Imaging, State Forms, and BenefitsCal UAT

All UAT activities will be performed remotely

C-IV UAT Update

Tester and SME Characteristics

Who should participate?

Desired Tester and SME Characteristics

- ✓ Deep and/or broad program policy knowledge
- ✓ Understand county processes
- ✓ Excellent analytical skills to identify issues/concerns
- ✓ Excellent communication skills
- ✓ Self-directed, enthusiastic, and excited about UAT

Next Steps

① CIT for C-IV counties released February 9

② CRFIs for UAT – distribution in next couple of weeks

③ UAT Kick-off March 15 for Test Scenario Development

④ UAT Finalize Test Scenarios April 19 – May 21

⑤ UAT Execution June 1 – September 3

GA/GR Data Sharing Update

Application Development & Policy

Policy Update

Medi-Cal Public Health Emergency

- DHCS has recently begun meetings with counties and SAWS to begin looking at the PHE lift

CalFresh

- Provides a 15% increase in SNAP benefits effective January 1, 2021 through June 30, 2021

CalWORKs

- Discussion regarding potential Golden State Stimulus

Other Potential Policy

- Providing feedback on potential budget requests and proposed legislation

Policy Updates

Upcoming SAWS Implementation Timelines

Date	Event
February 13-14, 2021	CF Emergency Allotments (Nov/Dec/Jan) CalHEERS Release 21.2
March 6, 2021	CF Emergency Allotments (Dec/Jan/Feb)
March 13, 2021	FPL COLA
March 21, 2021	21.03 CalSAWS Release
April 3, 2021 - Tentative	SSI COLA/CalFresh Households
April 2021 TBD	CF Emergency Allotments (Jan/Feb/Mar)
TBD	Potential $600 Golden State Stimulus payments.

Policy Update

Batch Review

- Prepare for doubling the Batch Operations processing with the cutover of C-IV to CalSAWS
  - Since October 2019, LRS (now CalSAWS) has been operating in the AWS Cloud
  - While technical stability has been very good, we are continuing to work on operational excellence
    - Problems in Batch often lead to a lot of remediation work for the Project Team and County Staff
  - In addition to performance enhancements and a LOT of testing, the team is going to perform a detailed operational readiness assessment
    - Organization Review
    - Process Optimization
    - Automation Review and Enhancements

CalSAWS Executive Risk Review

CalSAWS Risk & Issues Executive Summary

P Overall Project

High = 8	DD&I = 13
Med = 3	M&O = 2
Low = 4	

Risk Total: 15

Retired Risk Total: 1

New Risk Total: 2

Project Average Risk Exposure: 2.0

Legend

Risk 102: Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS M&O, and all existing projects

Risk 104: Functionality gaps between the 3 systems may result in a loss of functionality for some counties during migration to CalSAWS

Risk 201: Pace of policy changes may exceed capacity of App-Dev team, resulting in less automation

Risk 203: Project communications must be enhanced, otherwise stakeholder / audience needs will not be met

Risk 204: Volume of changes to baseline code may cause degradation in quality & increase in defects

Risk 206: Delays in staffing the Consortium and/or Accenture teams may delay the project schedule

Risk 208: CalHEERS release readiness delays may negatively impact CalSAWS delivery timelines, slowing critical updates to counties

Risk 226: COVID-19 relief efforts may impact CalSAWS DD&I schedule.

Risk 231: Delay of web browser compliance may impact users who do not use MS Internet Explorer

Risk 232: Delay in receiving the non-state forms translations may result in forms not being available prior to C-IV cutover

Risk 233 (Retired): Potential delay in delivering CalSAWS Contact Center Solution

Risk 234: The November 2021 implementation of Imaging and BenefitsCal for LA county may be impacted due to a delay of the complete migration of LA county's images

Risk 235: The BenefitsCal project release 1.0 may be delayed due to integration with the CalSAWS interface

Risk 236: The scaling of Analytics dashboards for 58 counties may have an impact on system performance

Risk 237 (New): The scaling of Batch for 58 counties may have an impact on system performance

Risk 238 (New): Without an integrated UAT plan, counties may be unable to properly plan for or participate in UAT as needed
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CalSAWS Project Issue and High/New Risk Update

Risk/ Issue #	Risk/Issue Name	Risk Status	Risk Trend
201	Pace of Policy Changes may exceed capacity of the project teams, resulting in less automation	The SFY 21-22 governor's budget was reviewed, and the project is projected to receive funding and timelines as expected. The project will be reaching out to CDSS regarding the CF COLA and CW MAP that are currently anticipated for 10/2021 effective dates. The team will work with state partners on a schedule to run September jobs earlier in order to get the finalized numbers due to the migration/pre-conversion taking place at the same time. Alternatives are being reviewed to minimize impact to migration, county workers and beneficiaries.	↔
203	Project communications must be enhanced, otherwise stakeholder / audience needs will not be met	The Power of 58 communication campaign outcomes and toolset were shared at the All Staff meeting in November and PSC in December. A CalSAWS Information Transmittal (CIT) was sent out for the Power of 58 Branding. The CalWIN Implementation Support Services team has issued 3 CRFIs to communicate with CalWIN counties since December 2020	↔
204	Volume of changes to baseline code may cause degradation in quality & increase in defects	The team is currently looking to expand on test automation outside of the regression test. For example, the API FDS work will leverage automated testing as the primary approach for the system test phase.	↔
226	COVID-19 relief efforts may impact CalSAWS DD&I schedule	There are several new initiatives from the Fed/State which are expected to be completed in the short term ($600 California Stimulus and 15% CalFresh COLA). These updates, along with DHCS FPL COLA, schedule CF Emergency Allotments, and other release and routine activities are being researched as they cause impacts to C-IV down time (availability during weekends). Additionally, as new initiatives are identified, there may be a need to ask the State to prioritize initiatives due to limitations in the available weekend timeframes to complete the scheduled batch jobs.	↗ (red)
231	Delay of Web Browser compliance may impact users who do not use MS Internet Explorer	Adobe Experience Manager (AEM) was prototyped and validation was completed with all the identified types of forms and threshold languages. The team is working with Adobe support on a minor font issue and a timeline for a solution is expected early February. The team is working on the development estimates and timelines to render the identified forms in HTML5 using AEM.	↔
235	The BenefitsCal project release 1.0 may be delayed due to integration with the CalSAWS interface	The team presented three mitigation options at the 12/3/2020 PSC and 12/4/2020 Board meetings. The JPA Board voted to proceed with Option 2 as the mitigation strategy. The team will split the scope of BenefitsCal phase 1 into two releases, with release 1 functionality being equivalent to or exceeding what is currently available in C4Yourself and deploying with the CalSAWS C-IV cutover in September 2021. A contingency/rollback plan is under development. The project team has estimated the level of effort to add a release and adjust the scope delivery dates as requested.	↔
236	The scaling of Analytics dashboards for 58 counties may have an impact on system performance	**Action Item #1:** *Document CalSAWS Analytics approach for demonstrating 58 county load performance and delivery schedule.* **In-progress**. Refinements to the documentation continue based on reviews and feedback **Action Item #2:** *Stability in batch job run times and adherence to 6am batch window over 5-10 day period.* **Complete** **Action Item #3:** *In parallel to the execution and completion of CDT, demonstrate successful execution of performance testing and 40 county load testing.* **In-progress**; tracking to Apr '21 completion **Action Item #4:** *58 county performance and load testing.* **Not started**; dependent on converted CalWIN data	↔
237 (New)	The scaling of Batch for 58 counties may have an impact on system performance	The CalSAWS production batch schedule does not always complete by 6am. There will be growth in both the count of batch jobs and volume of data as additional counties are converted into CalSAWS. This growth may add a challenge to batch completing on time. Batch performance test start date is under review to potentially start earlier and resources required to support this effort. Currently reviewing the classification of core and non-core batch jobs	↔
238 (New)	Without an integrated UAT plan, counties may be unable to properly plan for or participate in UAT as needed	There are multiple UAT efforts requesting county resources for the C-IV Migration: CalSAWS system, Imaging, and BenefitsCal. While these UAT efforts are supported by different teams, they will be potentially sharing test resources and requesting the same county and state participants. Scope, schedule, and resources must be aligned to support a seamless and positive UAT experience for all test participants and counties planning for and providing staff.	↔

Risk Trend Legend   ↔ Remains same   ↗ Trending to High   ↗ Trending to Medium   ↗ Trending to Low   ! Realized into an Issue   ☺ Retired Risk

CalSAWS Inclusion, Diversity, & Equity Advancement (IDEA) Update

IDEA Initiative Updates

All idea initiatives have been released in project wide

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.*

FOCUS		TITLE	AVAILABLE?	RELEASED?	DATE?	PROGRESS
HR	>	"We Are One"	Yes	Yes	11.16.20	
SURVEY	>	"Pulse Survey"	Yes	Yes	12.16.20	
MENTORSHIP	>	"Buddy Program"	Yes	Yes	1.29.21	
LEADERSHIP	>	"Lead with Intention"	Yes	No	3.18.21	
TRAINING	>	"Me, You, Us Training"	Yes	Yes	2.3.21	
WORKSHOPS	>	"Co-Creating on Inclusion & Diversity"	Yes	No	2.16.21 & 2.18.21	
SAFE SPACE	>	"CalSAWS Table Talks"	Yes	Yes	12.8.20	144

Pulse Survey Results

Baseline results of the IDEA Pulse Survey

Mentorship

N= 51%

Y= 48%

No 51.79% (227)

Yes 48.24% (209)
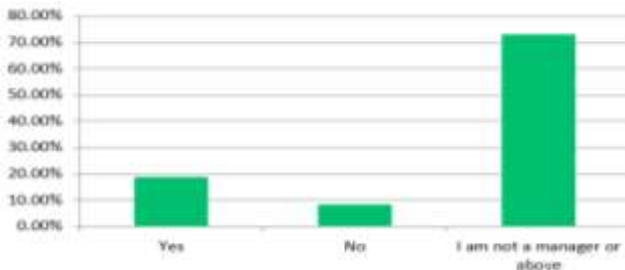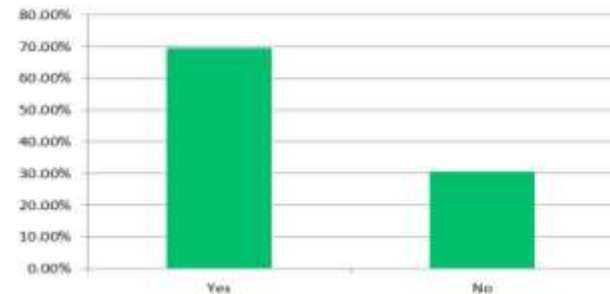
Positive: **Over 60% of people at CalSAWS said they felt like they have someone at CalSAWS that they would consider a "Mentor"

I&D Leadership Coaching

(Bar chart: Yes ~19%, No ~8%, I am not a manager or above ~72%)

81 people who would consider themselves managers and above would be interested in leadership coaching.

I&D Workshops

(Bar chart: Yes ~70%, No ~30%)

70%, or 302 people who responded would be interested in workshops.

GENERAL

	Diversity at work is important to me	I feel like I am an important member at CalSAWS.	I feel like I am able to be my true self	I can voice a contrary opinion without fear of negative consequences	I feel like I am treated fairly, regardless of my position	CalSAWS believes that people can always greatly improve their talents and abilities.
Strongly agree	51%	36%	37%	27%	32%	36%
Agree	36%	48%	45%	43%	51%	48%
Neutral	10%	12%	13%	20%	13%	14%
Disagree	1.5%	4%	4%	7%	3%	1%
Strongly Disagree	1%	2%	1%	2%	1%	1%

GENERAL

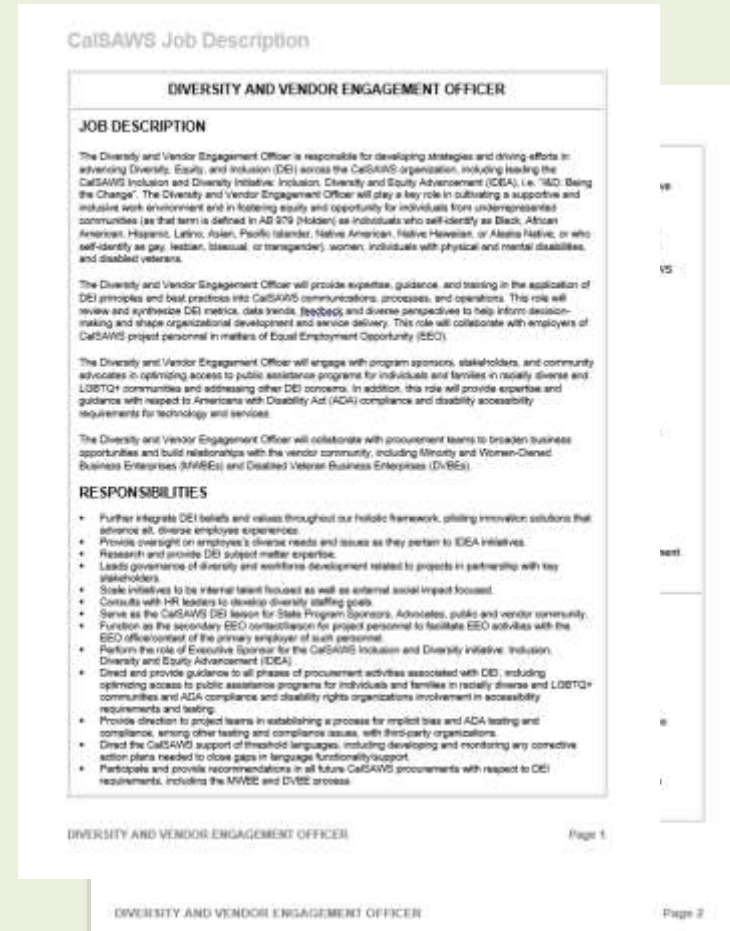|	I have things in common with others at CalSAWS	I feel respected and valued by my team at CalSAWS	I feel confident that there are PD opportunities	Inclusion, diversity and equity is a priority to your direct manager	Inclusion, diversity and equity is a priority to the leadership at CalSAWS
Strongly agree	35%	41%	29%	35%	37%
Agree	53%	52%	43%	44%	44%
Neutral	10%	5%	19%	18%	17%
Disagree	2%	2%	7%	2%	3%
Strongly Disagree	0	.5%	3%	1%	1%

IDEA

Training Update

- Collaborating with Sacramento County's development of self-directed training materials

- Completing Outline
  - Interactive reflection questions
  - Knowledge checks/answers

Civil Rights & Diversity Awareness
Sacramento County 2017

UC Davis Extension Center for Human Services

IDEA

Staffing & Resources

- Recruitment of the Diversity & Vendor Engagement Officer, posted February 4, 2021

- Concurrent county and public posting through Friday, March 5, 2021 (CIT 0033-21)

- Evaluating Regional Government Services (RGS) proposed support of IDEA initiatives

IDEA

Equitable Languages

- OSI is coordinating with CDSS, DHCS and SAWS

- Global approach to language translation

OCAT M&O/Production Update

OCAT M&O/Production Update
OCAT Help Desk Calls

	Nov 2020	Dec 2020	Jan 2021
Number of incoming calls	106	32	13
Number of outbound calls	1	1	17
Average interaction time	0:06:52	0:09:19	0:06:18

Most calls are related to:
- Login/Account Access
- Training Questions

OCAT M&O/Production Update

New OCAT – ASRs entered in SAWS vs. ASRs entered directly in OCAT

	November 2020		December 2020		January 2021	
	SAWS	**OCAT**	**SAWS**	**OCAT**	**SAWS**	**OCAT**
CalWIN	613	167	906	132	982	153
CIV	997	224	1184	153	1551	96
LRS	899	278	1143	92	1674	42
Total	**2509**	**669**	**3233**	**377**	**4207**	**291**
% OCAT Initiated Interviews		**21%**		**10%**		**6%**

OCAT M&O/Production Update

New OCAT ASRs Compared to Legacy OCAT ASRs

	Nov	Dec	Jan
New OCAT (11/20 – 1/21)*	3178	3610	4498
Legacy OCAT (11/19 – 1/20)	4324	4531	4668

*Beginning March 2020 to the present Welfare-to-Work participants are exempt from participating due to the COVID-19 pandemic, resulting in fewer OCAT interviews being conducted when compared to 2019. *Participation is voluntary at this time.

Legacy OCAT Access
- Legacy OCAT system is in inquiry only mode
- CDSS is targeting full historical data to be available to California counties at the end of March 2021

Procurement Update

CalSAWS Procurements
2021

- **Begin CalSAWS M&O Procurement**
  - Develop procurement strategy and schedule: January - February
  - Prepare and release Request for Information (RFI): March – April
  - Analyze RFI responses: May
  - Develop requirements: June - July
  - Prepare Draft RFP: August - November

CLOSED SESSION

Closed Session

18. Closed session under Government Code Section 54957: Threat to Public Services or Facilities

   ▪ Consultation with: John Boule, Executive Director

RETURN TO OPEN SESSION

19. Announcement of Action Taken in Closed Session, if any.

Adjourn Meeting