CalSAWS – CalWIN Implementation Support Weekly Status Report

Reporting Period: November 8, 2021 to November 14, 2021

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1.0 CalWIN Implementation Support Services

1.1 Highlights of the Reporting Period

Project Management
► Continued planning for and onboarding staff resources.
► Continued the monitoring of Action Items (AIs) and followed up with the points of contact (POCs) to update the statuses.
► Continued monitoring and updating the ISS Questions and Answers (Q&A) Log.
► Submitted the following Deliverables:
  o DEL08 Master Training Plan Final Deliverable Expectation Document (FDED) on 11/08/21.
  o DEL09 County Specific Training Plan FDED on 11/08/21.
► Submitted the following Work Products:
  o WP02 Santa Barbara To-Be Process Flows Draft Work Product (DWP).

Business Process Reengineering (BPR)
► Completed all To-Be sessions for Santa Barbara County.
► Submitted To-Be the DWP for Santa Barbara County.
► Completed Q&A sessions on Intake, Case Maintenance, Appointment Scheduling, Lobby Management, Imaging, and Task Management with Orange and Ventura Counties
► Prepared Wave-1 County-Specific BPR Plans for submission.

Figure 1 – To-Be Process Timetable by County

	Session Start Date	Session End Date	First Review Start Date	First Review End Date	Start Final Review	County Sign-Off on Final To-Be Work Product
Wave 1						
Contra Costa	06/21/21	07/30/21	08/04/21	09/02/21	09/02/21	09/10/21
Placer	06/21/21	07/30/21	08/04/21	08/20/21	08/30/21	09/07/21
Yolo	07/12/21	08/11/21	08/11/21	08/27/21	09/08/21	09/17/21
Wave 2						
Tulare	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21
Santa Clara	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21
Wave 3						
Santa Barbara	10/18/21	11/12/21	11/15/21	11/30/21	12/08/21	12/14/21
Orange	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Ventura	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Wave 4						
Solano	01/10/22	02/04/22	02/15/22	02/28/22	03/08/22	03/14/22
Santa Cruz	01/10/22	02/04/22	02/15/22	02/28/22	03/08/22	03/14/22
San Mateo	02/07/22	03/04/22	03/07/22	03/18/22	03/28/22	04/01/22
San Diego	02/14/22	03/11/22	03/14/22	03/25/22	04/04/22	04/08/22
Wave 5						
Alameda	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Fresno	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Sonoma	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Wave 6						
San Francisco	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Sacramento	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22
San Luis Obispo	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22

As of 11/14/21

Organizational Change Management (OCM)
► Continued drafting the DEL06 County Communication Plan DDEL.

► Reviewed the initial analysis of the change impacts identified by BPR for Wave-1 Counties with the Consortium.
► Met with the OCM POCs on 11/10/21 for the final meeting before starting the Change Network Champions (CNC) meetings.
► Continued to load additional change impacts for Wave 1 into ChangeScout.

Training
► Continued developing the draft training schedules based on County Profile information (Waves 5–6).
► Prepared for Wave-4 and 5 meetings with the Counties for the weeks of 11/11/21 and 11/15/21 to review draft schedules and training roles.
► Prepared for the 11/18/21 Training Advisory Committee (TAC) meeting.
► Continued training development and created instructional design documents for the CalSAWS Instructor-Led Training curriculum.
► Continued development of the Learning Journey Map.
► Participated in the CalWIN ISS Stand Up meeting on 11/08/21.
► Participated in the CalWIN ISS Regional Managers meeting on 11/09/21.
► Participated in the CalWIN User Acceptance Test (UAT) planning meeting on 11/12/21.

Implementation Support Services (ISS)
► Presented at the CalWIN County Stand-Up meeting on 11/08/21.
► Presented at the CalWIN Regional Managers meeting on 11/09/21.
► Conducted Conversion Office Hours on 11/9/21 and 11/10/21 for the second Case Review Guide: Update the Area Code/Phone Number for Text Messaging.
► Updated the FAQ for conversion activities based on office hours Q&A.
► Conducted an Analytics/Reporting follow-up meeting with leads on 11/12/21.
► Participated in the Contra Costa and Hyland Kick Off meeting on 11/04/21.
► Drafted a CalSAWS Request for Information (CRFI) on 11/12/21 for recruiting the Implementation Points of Contact (IPOC) for the CalWIN Counties.
► Participated in the CalWIN UAT planning meeting on 11/12/21.
► Participated in ongoing meetings with DD&I and the Consortium for conversion, imaging, application programming interface (API) user groups, and DDID.
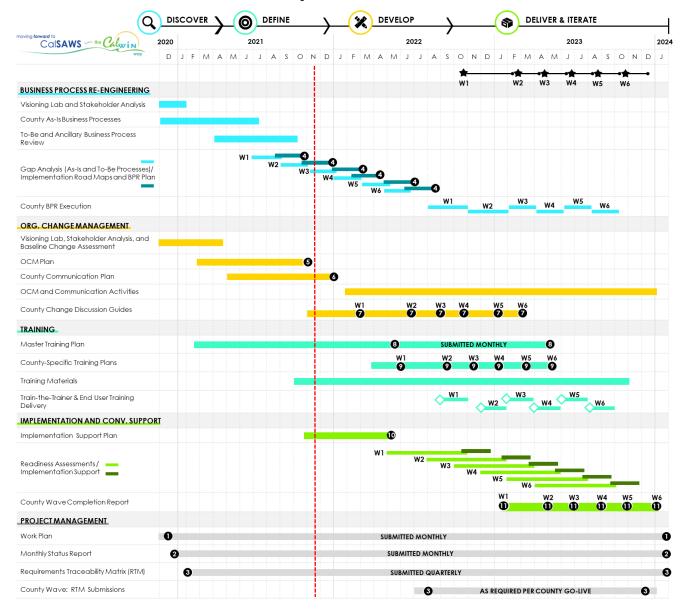
Project Timeline

Figure 2 – Project Gantt Chart

Project Timeline

1.2 Project Deliverable Summary

Deliverable Activity is summarized within the tables below.

Table 1 – Deliverable Status for Current Reporting Period

Completed	Coming Soon

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final
01	Workplan – Initial	12/04/20	12/15/20	12/23/20	01/14/21	01/22/21
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	01/27/21
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
04	Business Process Reengineering Plan	07/14/21	07/26/21	10/01/21	10/22/21	10/27/21
05	Organizational Change Management Plan	07/14/21	07/26/21	10/04/21	10/26/21	11/02/21
06	County Communication Plan	08/16/21	08/26/21	01/03/22	01/25/22	02/01/22
07	County Change Guide	01/14/22	01/27/22	03/24/23	04/17/23	04/24/23
08	Master Training Plan	10/27/21	11/08/21	05/13/22	06/06/23	06/13/23
09	County Specific Training Plan	10/27/21	11/08/21	05/08/23	05/30/23	06/06/23
10	Implementation Support Plan	01/14/22	01/27/22	05/16/22	06/07/22	06/14/22
11	Wave Completion Report	09/15/22	09/27/22	01/11/24	01/24/24	01/31/24

Table 2 – Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01	Workplan – Initial	Complete	
01.10	Work Plan – October 2021	On Track	FDEL submitted 11/05/21 FDEL approved 11/15/21
02	Monthly Status Report – Initial	Complete	
02.10	Monthly Status Report – October 2021	On Track	FDEL submitted 11/05/21 FDEL approved 11/15/21
03	Requirements Traceability Matrix Initial	Complete	
03.03	Requirement Traceability Matrix – Quarter 3	On-Track	FDEL submission 12/03/21 FDEL approval 12/10/21
04	Business Process Reengineering Plan	Complete	FDEL submitted 10/21/21 FDEL approved 10/27/21
04.01	County BPR Plan – Contra Costa	On-Track	DDEL submitted 11/29/21 FDEL submission 12/20/21
04.02	County BPR Plan – Placer	On-Track	DDEL submission 11/29/21 FDEL submission 12/20/21
04.03	County BPR Plan – Yolo	On-Track	DDEL submission 11/29/21 FDEL submission 12/20/21
05	Organizational Change Management Plan	Complete	FDEL submitted 10/26/21 FDEL approved 11/03/21
06	County Communication Plan	On-Track	DDEL submission 01/03/22 FDEL submission 01/25/22
07	County Change Guide	On-Track	DDED submission 01/14/22 FDED submission 01/27/22

DEL #	Deliverable Name	Status	Next Deadline
08	Master Training Plan	On-Track	FDED submitted 11/08/21 FDED approved 11/12/21
09	County Specific Training Plan	On-Track	DDED submitted 10/27/21 FDED approved 11/12/21
10	Implementation Support Plan	On-Track	DDED submission 01/14/22 FDED submission 01/27/22
11	Wave Completion Report	On-Track	DDED submission 09/15/22 FDED submission 09/27/22

1.3 Project Risks and Issues

There were no CalSAWS Risks or Issues created and/or still open for the reporting period.

Table 3 – Risks & Issues

ID	Title	Details	Status	Impact	Severity	Date Logged
N/A						

1.4 CRFI/CIT Communications Information

There are currently no open CRFIs for the reporting period.

Table 4 – CRFIs

CRFI ID	To	Subject	Category	Distribution Date	Response Due Date
N/A					

There are two (2) new CITs for the reporting period.

Table 5 – CITs

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0326-21	Wave 1	Wave 1 Counties T-12 Months Change Readiness Survey	General	11/01/21	Helen Cruz	Araceli Gallardo
0335-21	CalWIN Counties	Updated: Impacts: Revised Case Review Guide #2- Add/Update Area Code/Phone Number	Conversion	11/08/21	Cathryn van Namen	Juli Baker

1.5 Activities for the Next Reporting Period

Project Management
► Continue planning for and onboarding staff resources.
► Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
► Submit 04.01 BPR Plan – Contra Costa County for sign-off on 11/15/21.
► Submit 04.02 BPR Plan – Placer County for sign-off on 11/15/21.
► Submit 04.03 BPR Plan – Yolo County for sign-off on 11/15/21.

Business Process Reengineering (BPR)
► Complete week one of Orange and Ventura County To-Be sessions.
► Begin planning for Santa Cruz and Solano County To-Be sessions.
► Submit the Wave-1 County Specific BPR Plans for Contra Costa, Placer, and Yolo.

Organizational Change Management (OCM)
► Continue drafting the DEL06 County Communication Plan DDEL.
► Continue to review the initial analysis of the change impacts identified by BPR for Wave-1 Counties with the Consortium.
► Send the T minus-12 Change Readiness Survey to the Wave 1 Counties.
► Continue to load additional change impacts for Wave 1 into ChangeScout.

Training
► Continue developing the draft training schedules based on County Profile information (Waves 5–6).
► Prepare for Wave 4 and 5 meetings with the Counties for the weeks of 11/29/21 to review draft schedules and training roles.
► Prepare for and facilitate the 11/18/21 TAC meeting.
► Continue training development, creating instructional design documents for the CalSAWS Instructor-Led Training curriculum.
► Continue development of the Learning Journey Map.
► Participate in the Customer Engagement/CalWIN ISS Planning sessions on 11/15/21 and 11/16/21.

Implementation Support Services
► Participate in the CalWIN UAT Planning, Approach, and Next Step discussion with the RMs on 11/15/21.
► Socialize the implementation approach with the customer engagement team during the onsite meeting on 11/15/21 and 11/16/21.
► Conduct a meeting with conversion security application for planning (build timeline for dissemination).
► Participate in the Project Steering Committee (PSC) meeting on 11/17/21.
► Conduct a cross-project discovery meeting with Fiscal on 11/18/21.
► Continue to review the data reports with Gainwell and the Consortium Conversion Team for the remaining three (3) impacts.
► Develop CRGs for the three (3) OCM items that were prioritized.
► Schedule and conduct ongoing cross-project meetings for the App Dev, Consortium, ISS, and Customer Engagement teams.
► Complete and issue the CRFI for the Implementation Point of Contact (IPOC) in coordination with the Technical Team and the Technical Points of Contact (TPOCs).
► Participate in ongoing meetings with DD&I and the Consortium for conversion, imaging, API user groups, App Dev, and DDID.

1.6   Deviations from Plan/Adjustments
► None for the reporting period.