### CalSAWS | Project Steering Committee Meeting



# Agenda

- Call Meeting to Order
- 2. Agenda Review
- 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 Co-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

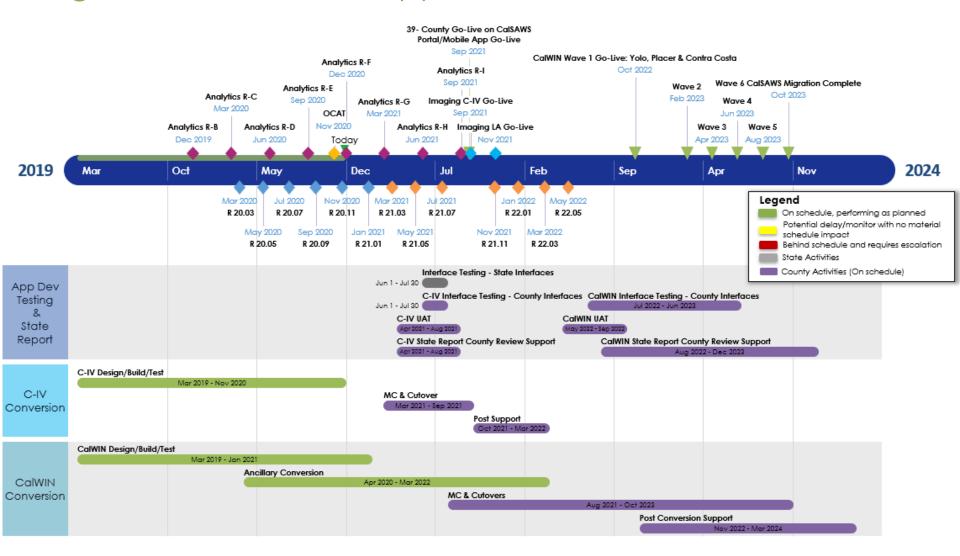
4. Approval of the Minutes of the November 5, 2020 PSC Meeting and review of Action Items.

# Informational Items

# CalSAWS Gantt Chart Update

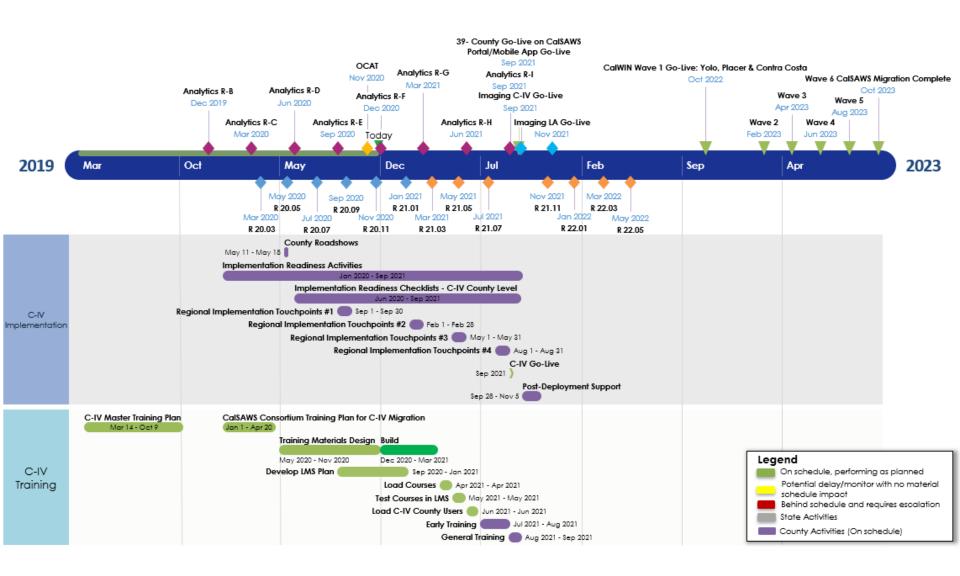
# CalSAWS Project Gantt

## High Level Overview- App Dev & Conversion



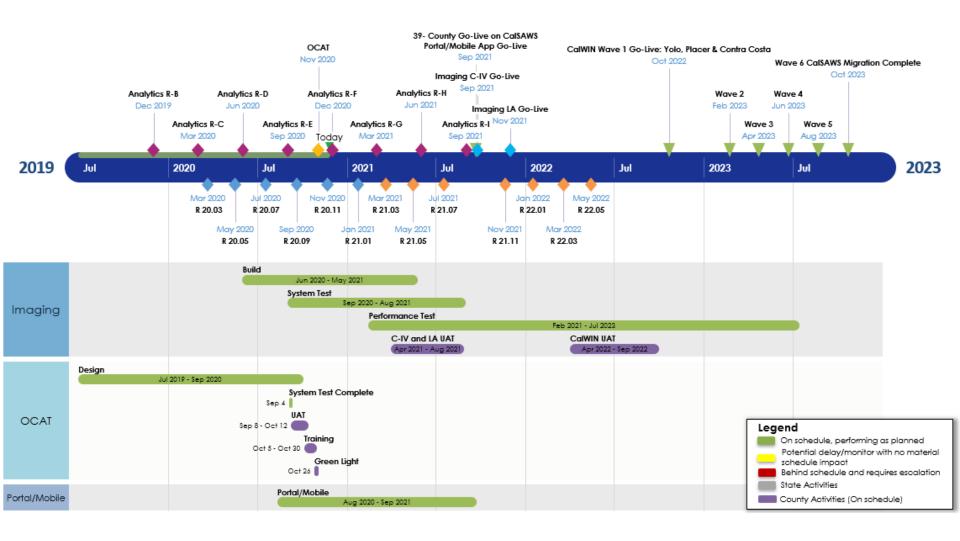
# CalSAWS Project Gantt

### High Level Overview- C-IV & Implementation



# CalSAWS Project Gantt

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



# BenefitsCal & CalSAWS Integration Schedule Risk

Public Comment: Soft Launch of BenefitsCal

#### Schedule 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.

### 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

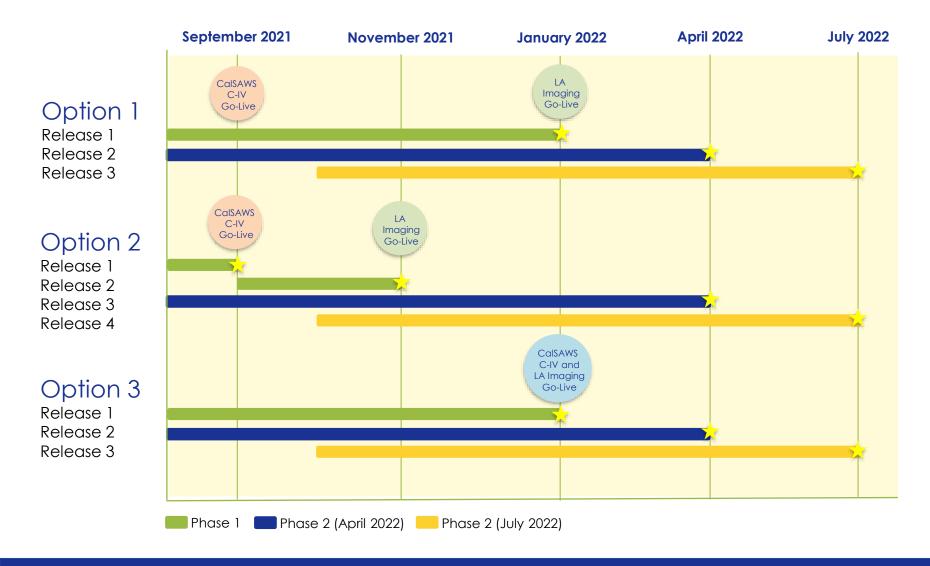
Keep deployments for BenefitsCal Phase 1 and the CalSAWS C-IV cutover together and shift the go-live date. Option 3 to be delivered as:

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

### 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

### Risk Options - Timeline



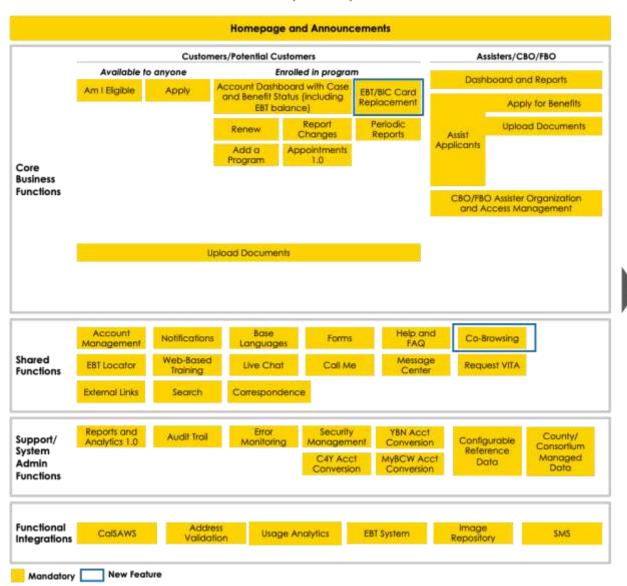
# Schedule Risk Options

	Option 1 Temporary Bridge	Option 2 Split Phase 1 into 2 Releases	Option 3 Shift All Dates
Description	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
Business/ Technical	<ul> <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> <li>New and modified APIs</li> <li>Design bifurcated</li> <li>Improved performance due to pull vs. push batch functionality</li> </ul>	<ul> <li>Impacts to when and how work is completed</li> <li>Could impact future policy commitments</li> </ul>
Implementation	<ul> <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> <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> <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>
Customers	<ul> <li>All functionality at one time</li> <li>Four-month delay in use of new portal</li> </ul>	<ul> <li>Functionality in two releases</li> <li>Existing access channels for Release 2 functionality</li> </ul>	<ul><li>All functionality at one time</li><li>Four-month delay in use of new portal</li></ul>
Schedule	<ul> <li>Release 1 – January 2022</li> <li>Release 2 – April 2022</li> <li>Release 3 – July 2022</li> </ul>	<ul> <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> <li>Release 1 – January 2022</li> <li>Release 2 – April 2022</li> <li>Release 3 – July 2022</li> </ul>
Cost	• \$1.7M	<ul> <li>Negligible/absorbed</li> </ul>	• \$15M+

# BenefitsCal RFP Mandatory/Optional Features

#### Mandatory Features

Original RFP Required Mandatory Features to be delivered

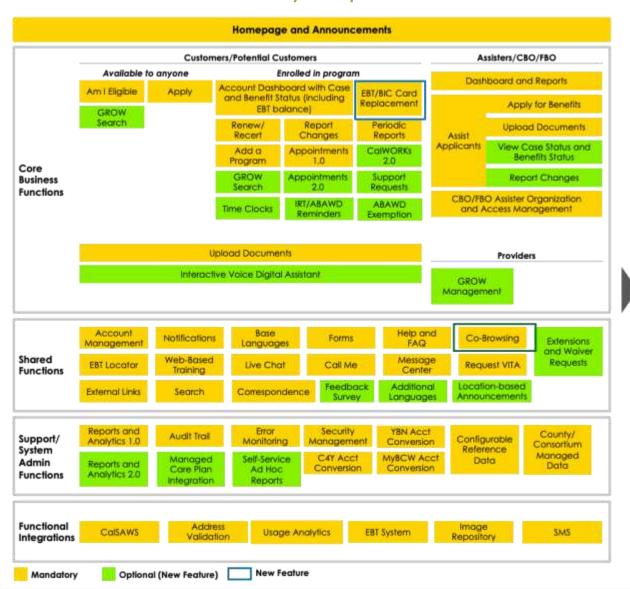


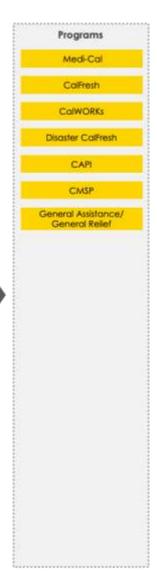


# BenefitsCal RFP Mandatory/Optional Features

# Optional Features

Optional
Features to be
delivered with
or after the
Mandatory
Features





### 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**

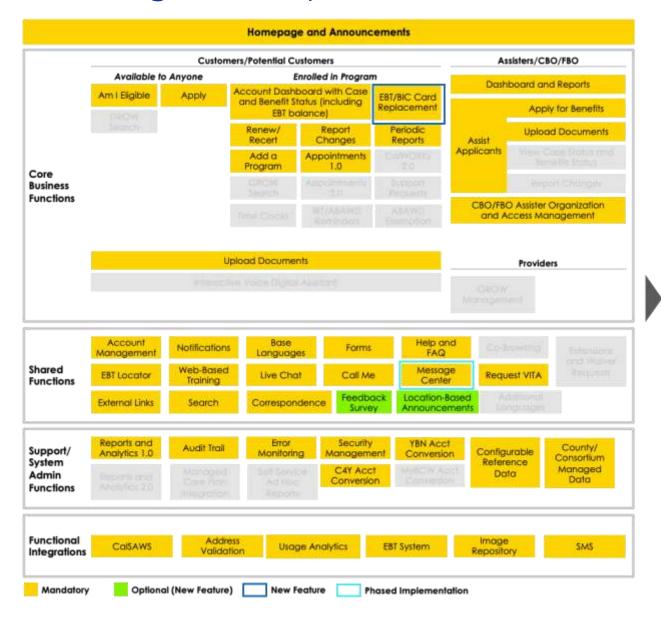
- Get all currently planned Release 1 functionality at one time
- Delayed use of new portal

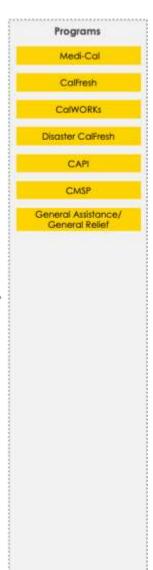
#### Cost / Resources

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

Option 1
Temporary
Bridge

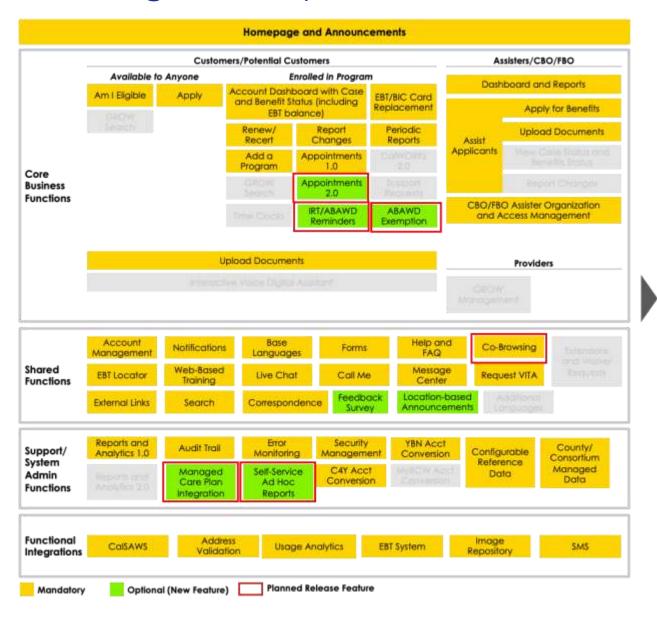
Jan 2022





Option 1
Temporary
Bridge

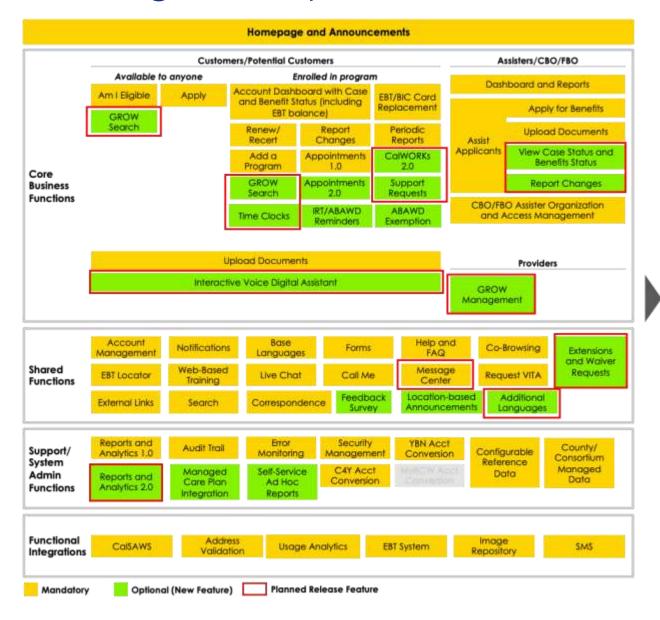
Apr 2022

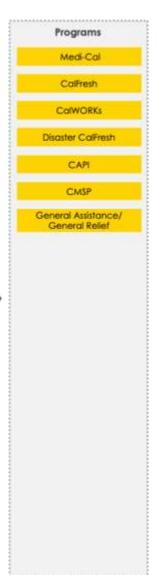




Option 1
Temporary
Bridge

Jul 2022





### 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

### 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

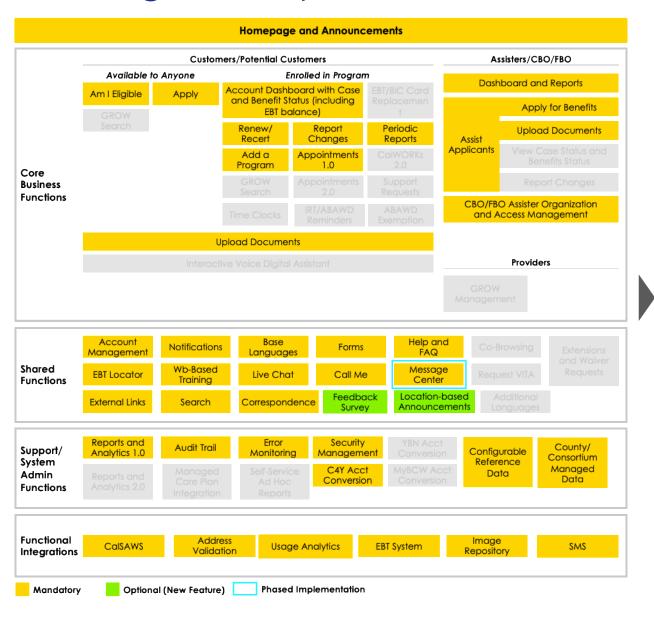
#### **Cost / Resources**

Negligible and will be absorbed by project

Option 2
Split Phase 1
into 2

Releases

**Sep 2021** 

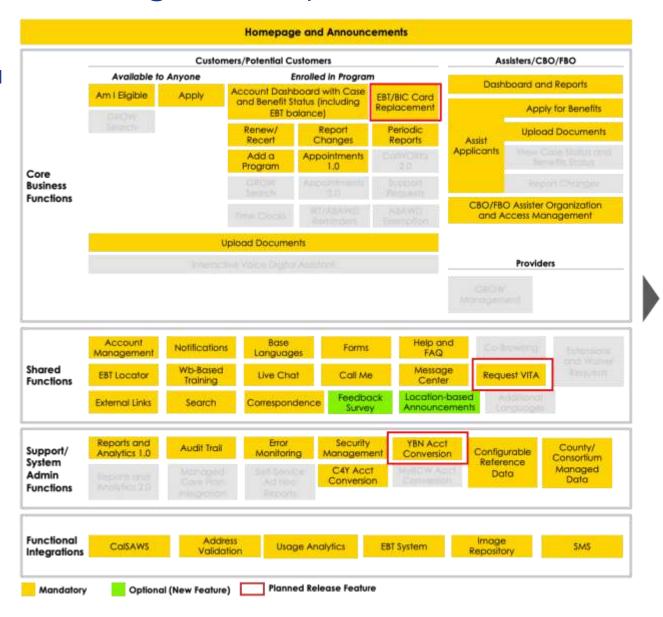




Option 2
Split Phase 1
into 2

Nov 2021

Releases

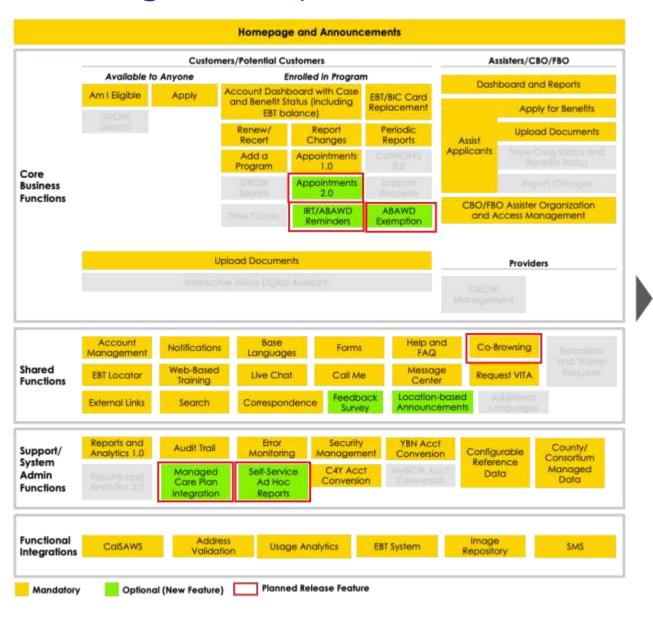




Option 2

Split Phase 1 into 2 Releases

**Apr 2022** 

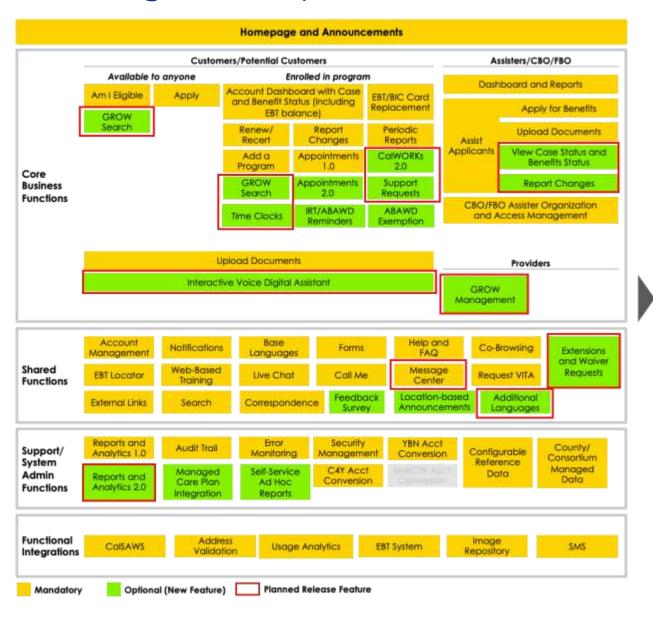




Option 2

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

#### Public Comment - Soft Launch

### **Soft Launch Option**

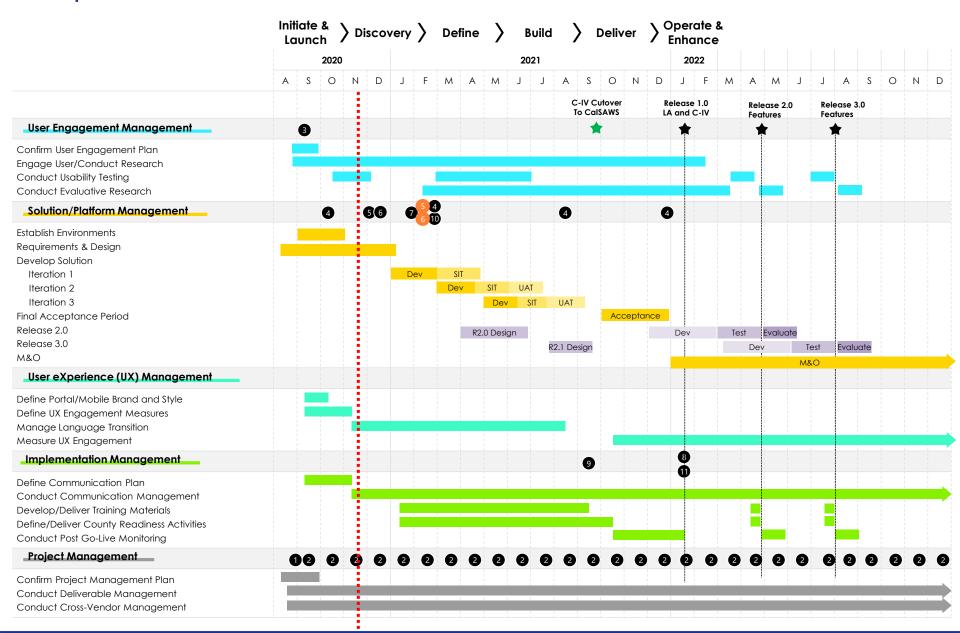
- Cutover date risk around September 2021 is not relieved with a soft launch:
  - May be exacerbated because of the launch of BenefitsCal while C4Yourself is still being supported
  - Some Counties and transactions would have to be routed in a new way while the other C-IV counties are still on C4Yourself
- 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

# Schedule Risk Options

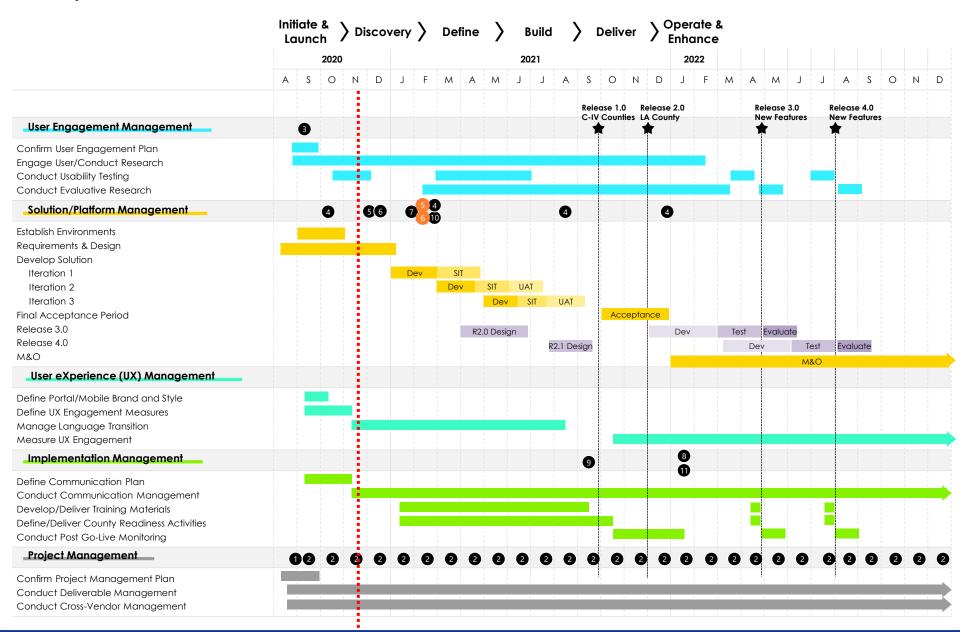
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Cost	• \$1.7M	<ul> <li>Negligible/absorbed</li> </ul>	• \$15M+

# Risk for Portal Go-Live Dates Appendix

## 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
Apply for Benefits Medi-Cal, CalFresh, and CalWORKs	Yes	Yes	1.0	No
Report a Change Address, Pregnancy, People Moving In/Out, Job Loss/Gain, Someone has Passed, Other	Yes	Yes	1.0	Yes
Redeterminations/Renewals	Yes	Yes	1.0	TBD
Periodic Reports	Yes	Yes	1.0	TBD
Homepage and Dashboards	Yes	Yes	1.0	No
Alerts & Notifications System announcements, nudges for items due	Yes	Yes	1.0	No
CBO/FBO CBO Dashboards, application submission, document upload	Yes	Yes	1.0	No
Account Management Create an account, reset password, Multi-Factor Authentication	Yes	Yes	1.0	Yes
Messages and Correspondence One-way from County to Customer	Yes	Yes	1.0	No
Document Upload	Yes	Yes	1.0	Yes
Appointments Ability to request and cancel appts	No	No	1.0	Yes
Screener: Am I Eligible 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
Administrative Screens Configuration of county preferences, maintaining help content	Yes	Yes	N/A	1.0	Yes
Reports (Admins) Operational reporting for usage	Yes	Yes		1.0	Yes
Languages 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
Help Center	Yes	Yes	N/A	1.0	No
C4Y User Conversion	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
YBN User Conversion	N/A	Yes	N/A	1.0	Yes	N/A
Support Request: VITA (Required for Jan 2022)	Yes	Yes, VITA	1 Mod	1.0	Yes	Paper-based submission*
Account At Risk  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
EBT and BIC Card Replacements Requests generate a task for County staff to address.	No	No	1 Mod	1.0	Yes	Customer calls County offices
GA/GR General assistance/general relief application.	Yes	Yes	1 Mod	1.0	Yes	Continue to use C-IV (manual program)

<sup>\*</sup> Assumed to be current process

### 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
Enhanced Appointments Online scheduling based on available slots	No	2 New	1.0	Yes	Call CWD / use Release 1.0 Feature
Co-Browsing (Screen sharing)	No	TBD	1.0	Yes	LogRocket Record/ Playback
IRT and ABAWD Reminders Reminders to customers to report income and work information (income reporting threshold).	No	2 New	1.0	Yes	NOAs
Self-Service Ad Hoc Reports 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

# 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
ABAWD Exemption Request Customers answer a few questions to exempt from work requirements	No	TBD	2.0	Yes	Call CWD or submit paper request
Managed Care Sharing demographic data between the Portal and Medi-Cal managed care plans	No	1 New	2.0	Yes	From CalSAWS - MEDS

# 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
Two-way Messaging Customer-initiated messages to caseworkers (bi-directional)	No	2 New	1.0	Yes	Call CWD
Amazon/Google Voice Service	No	1 New	3.0	No	N/A
GROW* Resource databank, search for services or jobs, make appts.	No	TBD	3.0	Yes	Call CWD
CalWORKS 2.0*  Customer-facing features to support OCAT.	No	TBD	3.0	Yes	Call CWD
<ol> <li>Support Requests</li> <li>CalFresh program participants to request medical expenses</li> <li>To request work registration exemptions</li> <li>Employment services participants can submit good cause reason WtW Form 27</li> <li>Employment services participants can submit a WtW Form 26 and 27</li> <li>WtW Form 8 for students</li> <li>WtW Form 31 to cure a sanction</li> </ol>	No	1 Mod	3.0	Yes	Submit paper form or call CWD

### 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
Authorized Representative and CBO Changes** Authorized representative security profile/role, and CBO ongoing case maintenance.	No	2 New	New	Yes	Call CWD
Language Translations  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
Time Clocks*  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

- 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



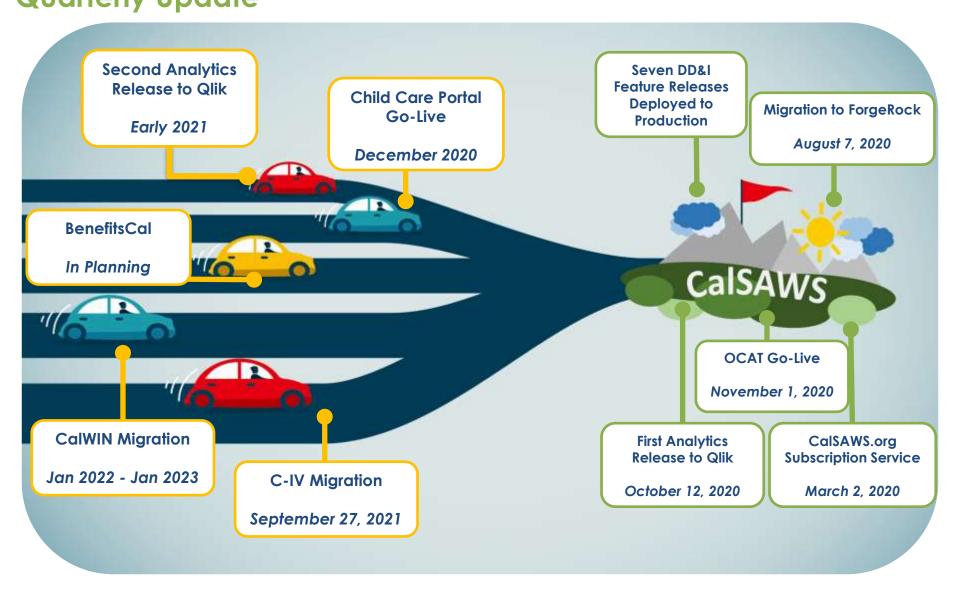
# How will the Los Angeles conversion of document images from EDMS impact the BenefitsCal go-live dates?

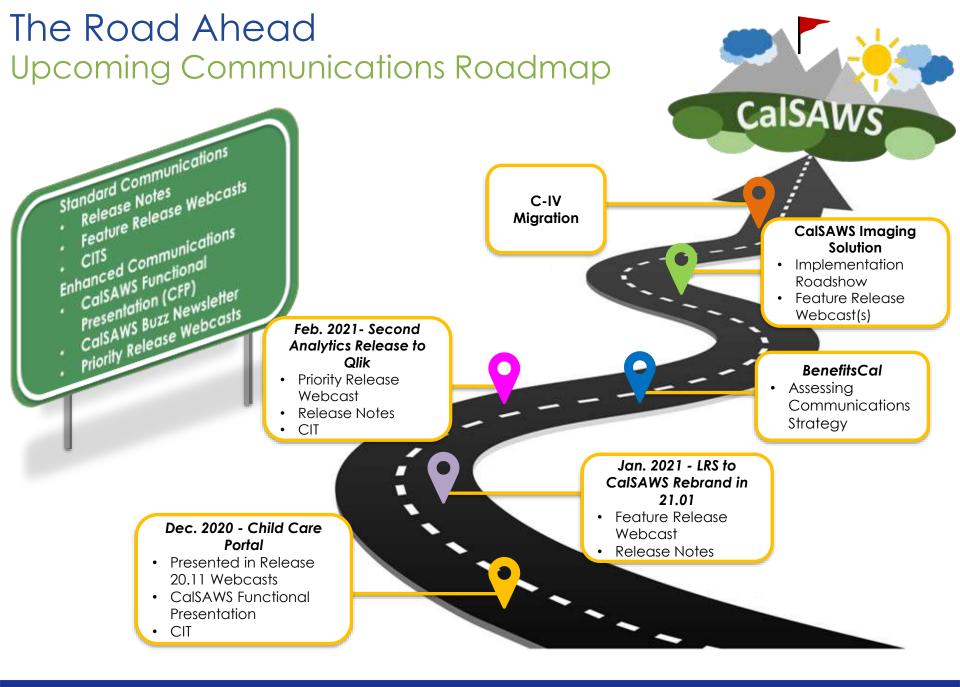
- Today, to collect and display documents, YBN interfaces with the Los Angeles imaging system, EDMS.
- There is no plan to build a temporary interface between EDMS and BenefitsCal or between EDMS and CalSAWS.
- The current plan is to complete the cutover of EDMS to CalSAWS Imaging in November 2021.
-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

# Quarterly CalSAWS Communication Update

 Power of 58 Communication Campaign

# CalSAWS DD&I Migration Communication Roadmap Quarterly Update





# C-IV Migration Communications



#### June 2021

- **CalSAWS Implementation News Blast**
- **Early Training Announcement**
- **Targeted Topic**
- T-3 Month Change Readiness **Assessment Survey**



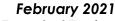
CalSAWS

#### **April 2021**

• Targeted Topic:

Task

Management



• Targeted Topic: Lobby

Management

#### March 2021

- **CalSAWS Implementation News Blast**
- Targeted Topic: Foster Care Eligibility Determination (FCED)
- T-6 Month Change Readiness **Assessment Survey**

#### January 2021

- Infographics
- **CalSAWS** Implementation **News Blast**
- Targeted Topic: Child Care

# 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.



#### Guides & Core Assets













Staff Portraits
with source files ability for
unlimited customization



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

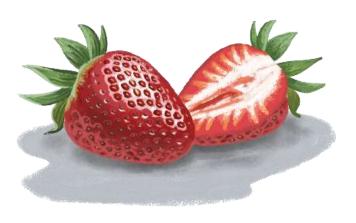


Statewide & County Specific Doodles

### Ventura County







### Merced County





### LA County





### CalSAWS Project Team Line of Sight

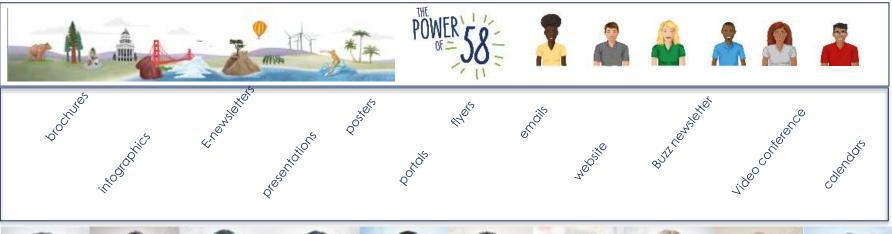
Customer Engagement Team

RM's

Committee Facilitators

Implementation/ Change Management

#### County Communicators (e.g. District Directors, PPOCs, IPOCs)























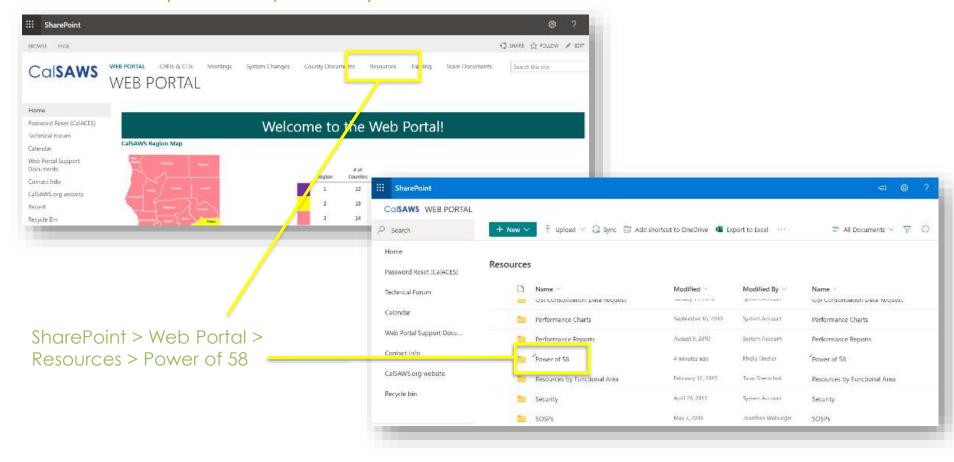
### County Available Assets



Video Conferencing Backgrounds



### Web Portal (for county access)



#### What do you think?

Go to www.menti.com and use the code 59 02 51 9 Mentimeter How do you think the counties should use the new Power of 58 look and feel?

# Portal/Mobile Update

- Brand Update
- Overview Survey Outcomes

### We heard from many Californians.

25,814

Total submissions

4,881

Internal Submissions

20,933

External Submissions

**17** 

Languages

**57** 

Counties

1

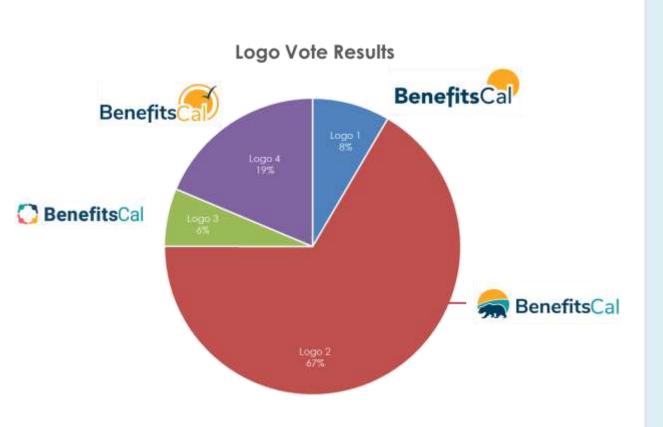
Clear Winner

We have a winner!

BenefitsCal

### Total Logo Survey Results

Folks resoundingly selected Logo #2, the bear.



#### RESULTS

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

# Survey Highlights

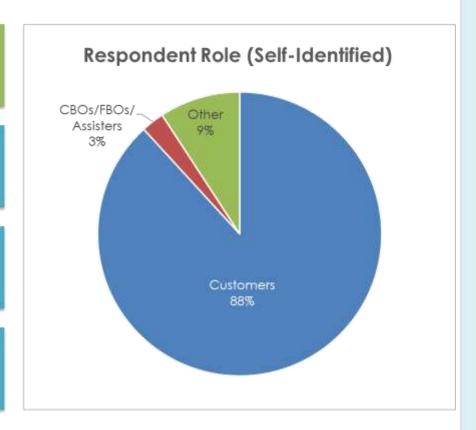
### The survey opened 11/10 and closed 11/18



18,395 customers

**595** assisters

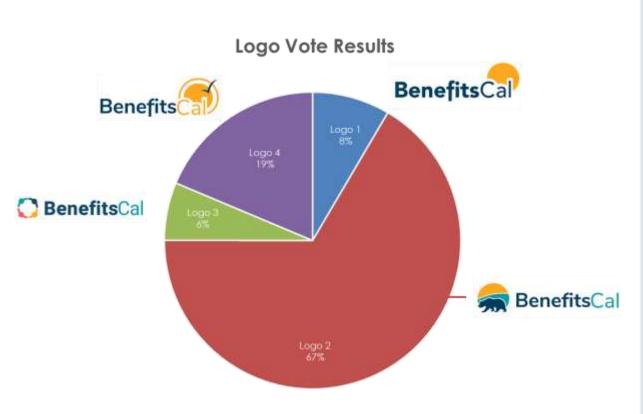
1,943 other

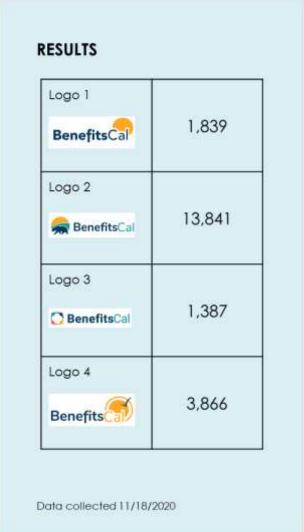


#### HIGHLIGHTS

- 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.

### External Folks also resoundingly selected Logo #2





57 of 58 counties are represented by the external survey submissions



Top 10 Counties by	y 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.

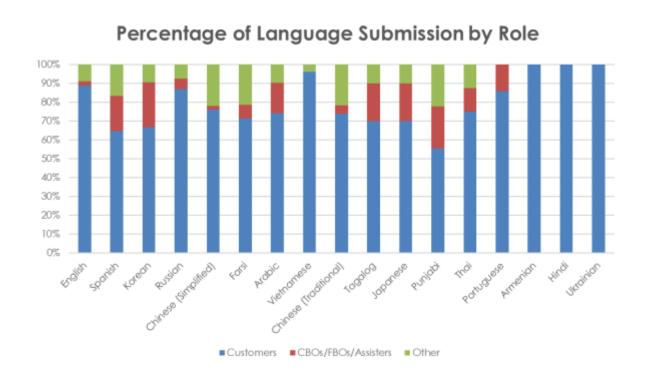
The survey was available in 19 languages. It was also emailed to customers in all 19 languages.



#### 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.

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

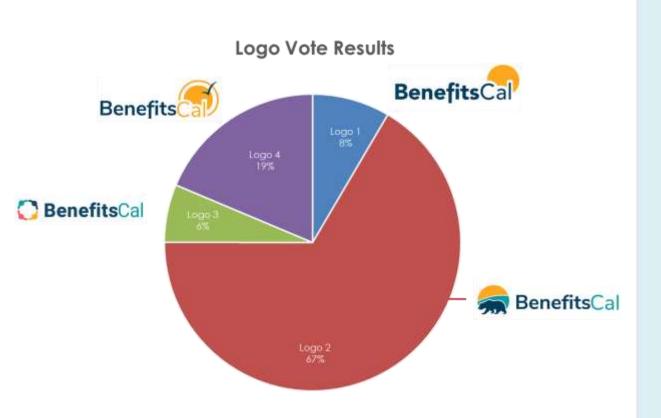


#### HIGHLIGHTS

- 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.

# Internal Logo Survey Results

### Internal Folks also resoundingly selected Logo #2



#### RESULTS

349
3,337
242
953

# Internal Logo Survey Results

49 of 58 counties are represented by the internal survey

submissions



Top 10 Counties b	y 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.

Application Development & Policy

# 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).

CalSAWS Diversity, Equity, & Inclusion (DEI) Update

### 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.

# Inclusion, Diversity and Equity Advancement Initiatives

INITIATIVE	FOCUS	OBJECTIVE	BRIEF DESCRIPTION
Developing a CalSAWS I&D Vision: "We are one"	¾ 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)
Project Pulse	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
Buddy Program	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
Lead with Intention	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
Me, You, Us Training	₽ <sub>♥</sub> 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
Co-Creating on Inclusion & Belonging	wew 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
CalSAWS Table Talks	<u>ຍໍດິຍໍ</u> SAFE SPACE	Encourage educating ourselves on diverse experiences by providing a safe space for candid conversations with our CalSAWS coworkers 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

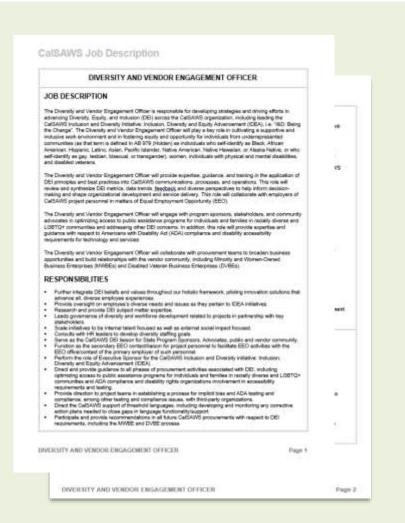
### Training Plans to Date

- 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 selfdirected training materials in mid-December, which can then be leveraged by the Consortium



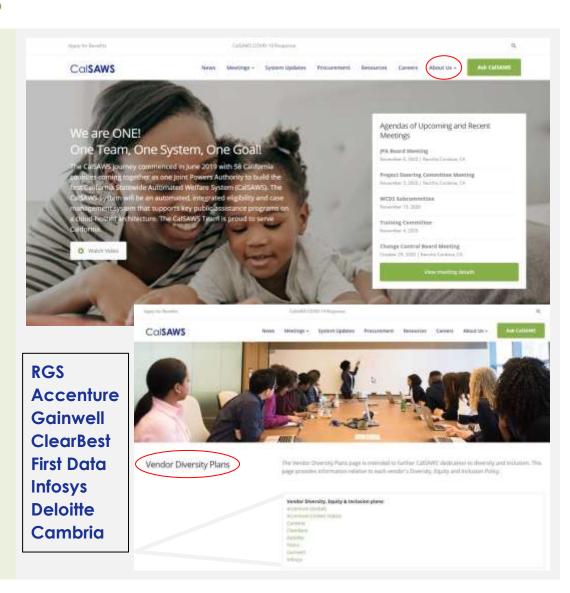
### Staffing & Resources

- 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



### Vendor Diversity Plans

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



# CalSAWS Analytics & Reports Update

# **Analytics Reports Replatform**

### Migrating C-IV and LRS Dashboards, State, & Mgmt. Reports

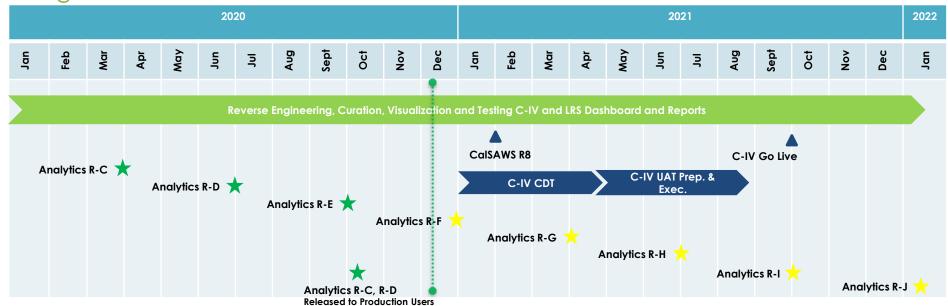
- Analytics Releases C and D have been deployed to LRS for LA County Users in October
- Release E has been deployed to Soft-Launch for LA County Testing in LRS in October
- Release E County Testing Completed at the end of November
- Release F continues In-Development and remains On-Schedule
  - Release G J On-Schedule for Future Development and Testing

Further Testing	C-IV	CalWIN
Converted Data Testing (CDT)	Jan. – Apr. 2021	Nov. '21 – Jun. '22
User Acceptance Testing (UAT)	Jun Aug. 2021	Jul Sep. 2022

5.

# Analytics Reports Replatform

High Level Release Plan and Overall Status



Analytics Release	Status	Release Date (Soft Launch Testing)	Dashboards	State & Mgmt. Reports	Total Reports (% Complete)	Notes
С	Released to LRS	10/12/20	2	0	2 (<1%)	Deploy All C-IV Reports prior to
D	Production		4	32	<b>36</b> (8%)	CalSAWS C-IV CDT Completion
Е	County Tested and Complete in LRS Soft-Launch	9/30/20	7	60	<b>67</b> (21%)	
F	In Development (On-Schedule)	1/15/21	3	74	77	
G	Future	3/30/21	4	98	102	
Н	Development (On-Schedule)	6/30/21	6	68	74	
T	9/30/21	9/30/21	1	68	69	
J		1/15/22	0	66*	66	*All Mgmt. Reports
Total Reports			27	466	493	

# CalSAWS Analytics: County Communication and Enablement

County Enablement and Training

- County Communication Webinars Complete
- Release Management Communication In Accordance with Analytics Release(s)
- County Training
  - How Counties can Perform Data Analysis using the CalSAWS Enterprise Reporting tool Qlik Sense
  - How Counties can Access CalSAWS Data Sources for Custom Reports Needs

# CalSAWS Analytics: Training Types

## Training Sessions

Training Types and Details	Adhoc Reporting - Connect and Query	Qlik Platform Capabilities
Audience	Ad Hoc Reports Developers; those with the access and technical expertise to generate Ad Hoc reports	General Users and/or Ad Hoc Reports Developers
Delivery Approach	Virtual Training Sessions (VTS), recorded for future use; include deck; hybrid of live virtual and recorded, including hands-on exercises	Web Based Training (WBT)
Content	Connecting to, and querying, the data lake and RDS; communicate the shared vs. consortia-specific nature of the data and resources; leveraging available resources (incl, PBDs documentation, C-IV data model, etc.)	Story feature, bookmarks, duplicate sheet, add object, leveraging available resources
Timeline	Sept '21 (as C-IV adhoc reporting becomes possible)	Planning 2021 (1 <sup>st</sup> Quarter)

# Procurement Update

Central Print



# **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

# State Partners Updates

- OSI
- CDSS
- DHCS

# Regional Updates



January 2021 PSC Meeting Discussion

Accenture Satisfaction Survey

# Customer Satisfaction Survey

### Background

- The Customer Satisfaction Survey is a standardized, 8question 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?

# JPA Board December Meeting Overview

# Adjourn Meeting