CalSAWS – CalWIN Implementation Support Weekly Status Report

Reporting Period: September 6, 2021 to September 12, 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.

Business Process Re-Engineering (BPR)
► Received formal sign-off for the To-Be Final Work Products (FWPs) for Placer and Contra Costa Counties.
► Resolved comments received for the Yolo County To-Be Draft Work Product (DWP) and submitted the FWP for formal sign-off.
► Completed meetings with Wave-4 and Wave-5 Counties to provide a preview for To-Be BPR and suggested preparation.
► Completed Q&A Sessions on Intake, Case Maintenance, Lobby Management, Appointment Management, Imaging and Task Management with Santa Clara and Tulare Counties (Wave-2) in preparation for To-Be Sessions starting on 09/13/21.

Figure 1 – To-Be Process Timetable by County

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	09/15/21
Wave 2						
Tulare	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/05/21
Santa Clara	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/05/21
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	12/15/21	12/31/21	01/10/22	01/14/22
Ventura	11/15/21	12/14/21	12/15/21	12/31/21	01/10/22	01/14/22
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	02/07/22	03/04/22	03/07/22	03/18/22	03/28/22	04/01/22
Wave 5						
Alameda	03/07/22	04/01/22	04/04/22	04/15/22	04/25/22	04/29/22
Fresno	03/07/22	04/01/22	04/04/22	04/15/22	04/25/22	04/29/22
Sonoma	04/04/22	04/29/22	05/02/22	05/13/22	05/23/22	05/27/22
Wave 6						
San Francisco	04/04/22	04/29/22	05/02/22	05/13/22	05/23/22	05/27/22
Sacramento	05/02/22	05/27/22	05/31/22	06/14/22	06/21/22	06/28/22
San Luis Obispo	05/02/22	05/27/22	05/31/22	06/14/22	06/21/22	06/28/22

***As of 09/10/21**

Organizational Change Management (OCM)
► Continued building content for the September OCM POC meeting presentation.
► Continued drafting the County Communication Plan Draft Deliverable (DDEL).

► Continued drafting the OCM Plan DDEL.
► Reviewed the September CalWIN Monthly Stand-Up presentation.
► Demonstrated additional ChangeScout functionality with the Consortium.

Training
► Continued developing the draft training schedules based on County Profile information (Waves 3 – 6).
► Scheduled meetings with Wave-2 Counties for the week of 09/20/21 to review draft schedules and training roles.
► Continued training development by creating instructional design documents for the CalSAWS Instructor-Led Training curriculum.
► Continued developing the prototype of the Learning Journey Map.
► Met with the Consortium lead for General Assistance or General Relief (GA/GR) on 09/09/21 to discuss training for CalWIN User Acceptance Testing (UAT).
► Planned and prepared materials for the 09/15/21 Training Advisory Council (TAC) meeting and scheduled review with Regional Managers and Consortium Training team.
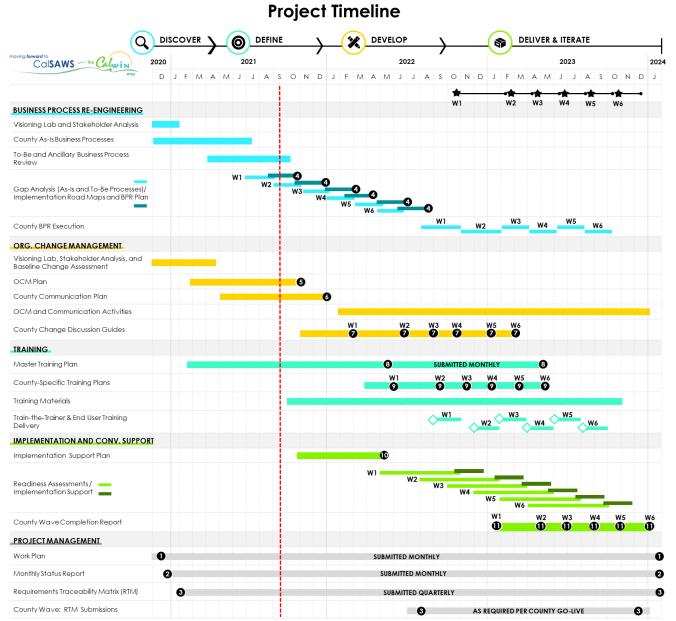
Implementation Support Services (ISS)
► Continued to review the conversion activities that will impact conversion of the CalWIN Counties.
► Conducted follow-up meetings on 09/09/21 and 09/10/21 with the Conversion and Gainwell teams in preparation of conversion activities.
► Finalized the Visioning Lab II survey and recap for distribution the week of 09/13/21.
► Incorporated comments and feedback for two (2) Case Review Guides from the Consortium Team and WCDS reviews.
► Updated reporting requirements for Conversion Impact ID 89 and sent to Gainwell for further review.
► Participated in ongoing meetings with DD&I and the Consortium for conversion, 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 Re-Engineering 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	
01.08	Work Plan – Aug 2021	On-Track	FDEL submitted on 09/03/21 FDEL approval due 09/13/21
02	Monthly Status Report – Initial	Complete	
02.08	Monthly Status Report – Aug 2021	On-Track	FDEL submitted on 09/03/21 FDEL approval due 09/13/21
03	Requirements Traceability Matrix Initial	Complete	
03.02	Requirement Traceability Matrix – Quarter 2	On-Track	FDEL submit 09/03/21 FDEL approval due 09/13/21
04	Business Process Re-Engineering Plan	On-Track	DDEL submission due 10/01/21
05	Organizational Change Management Plan	On-Track	DDEL submission due 10/04/21
06	County Communication Plan	Complete	FDED submitted on 08/26/21 FDED approved 08/31/21
07	County Change Guide	On-Track	DDED submission due 01/14/22
08	Master Training Plan	On-Track	DDED submission due 10/27/21
09	County Specific Training Plan	On-Track	DDED submission due 10/27/21
10	Implementation Support Plan	On-Track	DDED submission due 01/14/22
11	Wave Completion Report	On-Track	DDED submission due 09/15/22

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

1.4   CRFI/CIT Communications Information

There were no CalSAWS Information Transmittal (CIT) sent and/or still open for the reporting period.

Table 4 – CITs

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact

There were no CalSAWS Requests for Information (CRFIs) sent and/or still open for the reporting period.

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.
► Receive approval for the following Deliverables on 09/13/21:
   o 02.08 Monthly Status Report – August 2021
   o 01.08 Work Plan – August 2021
   o 03.02 Requirement Traceability Matrix – Quarter 2

Business Process Re-Engineering (BPR)
► Obtain Yolo County To-Be FWP formal sign-off.
► Complete Week-1 To-Be BPR Sessions with Santa Clara and Tulare (Wave-2) Counties.
► Complete Pre-Meet Part-1 with Santa Barbara County in preparation for To-Be BPR.

Organizational Change Management (OCM)
► Continue building content for the September OCM POC meeting presentation.
► Continue drafting the County Communication Plan DDEL.
► Continue drafting the OCM Plan DDEL.
► Continue building the September CalWIN Monthly Stand-Up meeting presentation.

Training
► Continue developing the draft training schedules based on County Profile information (Waves 3 – 6).

► Confirm and prepare for Wave-2 meetings with the Counties for the week of September 20 to review draft schedules and training roles.
► Continue training development by creating instructional design documents for the CalSAWS Instructor-Led Training curriculum.
► Continue prototype development of the Learning Journey Map.
► Participate in the CalWIN ISS Status meeting with the Regional Managers on 09/14/21.
► Finalize the presentation materials and facilitate TAC meeting on 09/15/21.
► Participate in a planning session with the CalWIN ISS Leads and the Consortium Customer Engagement Team on 09/17/21.

Implementation Support Services
► Continue to review the conversion activities that will impact conversion of the CalWIN Counties focusing on re-prioritizing.
► Continue to create report requirements documents for OCM items.
► Discuss Conversion Activities with the Counties at the CalWIN Stand-Up meeting on 09/13/21 and the CalWIN ISS Status meeting with the Regional Managers meeting on 09/14/21.
► Distribute the Visioning Lab Survey to County leadership on 09/13/21.
► Distribute two (2) Case Review Guides via the CIT process for County activity.
► Participate in ongoing meetings with DD&I and the Consortium for conversion, API user groups, and DDID.

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