CalSAWS | JPA Member Representatives and Board of Directors Meetings



June 29, 2023

Agenda

- 1. Call Meeting to Order
- 2. Confirmation of Quorum, Agenda Review, and Protocols.
- 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.

JPA Board Action Items



CalSAWS Member Representatives Action Items



Member Representatives Action Items

- Nominations, Elections, and Appointments of the JPA Board and Project Steering Committee Members for Fiscal Year 2023/2024.
 - a. Pursuant to the JPA Agreement Article II, Section 2.04, subsections (c) and (d), the Directors from Regions 1 through 5 shall be selected from the Member Representatives from their respective Regions. Regions 1 and 4 shall each select two (2) Directors, Regions 2 and 3 shall each select one (1) Director, and Region 5 shall select three (3) Directors. Region 6, represented by Los Angeles County, shall have three (3) Directors, who shall be the three (3) Member Representatives from Region 6.
 - i. Present the nomination slate from the Regional Nomination conference calls, gather any further nominations from the floor, and proceed to elect the JPA Board of Directors for those Regions for the period of July 1, 2023, through June 30, 2024.
 - ii. Introduce the Directors appointed by Region 6 for the Period of July 1, 2023 through June 30, 2024.

Region 1 JPA Board Nominees

Marla Stuart

Contra Costa Employment & Human Services Department

Previous Counties Served: Solano and Sonoma

Total Years of Service: 36

Kelley Curtis

Solano County Health & Social Services

Previous Counties Served: Contra Costa

Total Years of Service: 19





Director

Region 2 JPA Board Nominee

Greg Geisler

Placer County Human Services

Total Years of Service: 27



Region 3 JPA Board Nominee

Bekkie Emery

Mendocino County Health and Human Services Agency

Total Years of Service: 25



Region 4 JPA Board Nominees

Chris Woods

San Joaquin County Human Services Agency

Previous Counties Served:

Kern

Santa Barbara

Total Years of Service: 25

Francena Martinez

Tulare County Health & Human Services Agency

Total Years of Service: 21



Director



Region 5 JPA Board Nominees

An Tran Orange County Social Services Agency

Total Years of Service: 24

Gilbert Ramos

San Bernardino County Human Services Agency

Total Years of Service: 31

Paula Llanas

Imperial County Department of Social Services

Total Years of Service: 20



Chief Deputy Director







Director

Region 6 JPA Board Appointments

Kristin Stranger

Los Angeles County Department of Public Social Services

Previous Counties Served: El Dorado and Calaveras

Total Years of Service: 18

Assistant Director

Michael Sylvester

Los Angeles County Department of Public Social Services

Previous Counties Served: Riverside

Total Years of Service: 21



Acting Chief Deputy

Cynthia McCoy-Miller

Los Angeles County Department of Children and Family Services

Total Years of Service: 43



Senior Deputy Director

Member Representatives Action Items

- 4. Nominations, Elections, and Appointments of the JPA Board and Project Steering Committee Members for Fiscal Year 2023/2024.
 - b. Pursuant to the JPA Bylaws Article VIII, Paragraph A., each Region will nominate one or more candidates from among its Deputy Directors, or small county equivalents, to serve on the Project Steering Committee. Regions 1 and 4 will each appoint two (2) Project Steering Committee members, Regions 2 and 3 will each appoint one (1) Project Steering Committee member, and Regions 5 and 6 will each appoint three (3) Project Steering Committee members.
 - i. Present the nomination slate from the Regional Nomination conference calls, gather any further nominations from the floor, and proceed to elect the Project Steering Committee for the period of July 1, 2023 through June 30, 2024.
 - ii. Introduce the Project Steering Committee Members appointed by Region 6 for the period of July 1, 2023 though June 30, 2024.

Region 1 PSC Nominees

Anna Pineda

San Francisco County Human Services Agency

Previous Counties Served: Contra Costa and Solano

Total Years of Service: 31



Deputy Director

Clarisa Simon

San Mateo County Human Services Agency

Total Years of Service: 23



Director – Staff Development, Training and Information Services

Region 2 PSC Nominee

Eduardo Ameneyro

Sacramento County Department of Human Assistance

Total Years of Service: 23



Deputy Director

Region 3 PSC Nominee

Rachel Ebel-Elliott

Mendocino County Health and Human Services Agency

Total Years of Service: 20



Deputy Director

Region 4 PSC Nominees

Cindy Uetz

Kern County Department of Human Services

Total Years of Service: 37

Cesilia Leon

Merced County Human Services Agency

Total Years of Service: 21



Chief Deputy Director



Deputy Director

Region 5 PSC Nominees

Elaine Martinez

Ventura County Human Services Agency

Total Years of Service: 25

Alberto Banuelos

San Diego County Health and Human Services

Previous County Served: Tulare

Total Years of Service: 24

Sandra Bowlan

Riverside County Department of Public Social Services

Total Years of Service: 23



Deputy Director



Assistant Director



Deputy Director

Region 6 PSC Nominees

Los Angeles County	
LOS / Ingeles Courry	
Donartmont of Public	

La Shonda Diggs

Department of Public Social Services

Winna Crichlow

Los Angeles County Department of Public Social Services

Olga Vicuna

Los Angeles County Department of Children and Family Services

Total Years of Service: 26

Total Years of Service: 25

Total Years of Service: 24



Division Chief



Division Chief



Division Chief

JPA Board

Nominations

Region 1	Marla Stuart, Director
	Kelley Curtis, Director

- Region 2 Greg Geisler, Director
- Region 3 Bekkie Emery, Branch Director
- Region 4 Francena Martinez, Director Chris Woods, Director
- Region 5 An Tran, Director Gilbert Ramos, Director Paula Llanas, Director

Contra Costa Solano Placer Mendocino Tulare San Joaquin

Orange San Bernardino Imperial

Appointments

Region 6Michael Sylvester, Acting Chief DeputyLos AngelesKristin Stranger, Assistant DirectorCynthia McCoy-Miller, Senior Deputy DirectorLos Angeles

Project Steering Committee (PSC)

Nomination Slate

Region 1	Anna Pineda, Deputy Director Clarisa Simon, Director – Staff Development, Training and Information Services	San Francisco San Mateo
Region 2	Eduardo Ameneyro, Deputy Director	Sacramento
Region 3	Rachel Ebel-Elliott, Deputy Director	Mendocino
Region 4	Cindy Uetz, Chief Deputy Director Cesilia Leon, Deputy Director	Kern Merced
Region 5	Elaine Martinez, Deputy Director Alberto Banuelos, Assistant Director Sandra Bowlan, Deputy Director	Ventura San Diego Riverside

Appointments

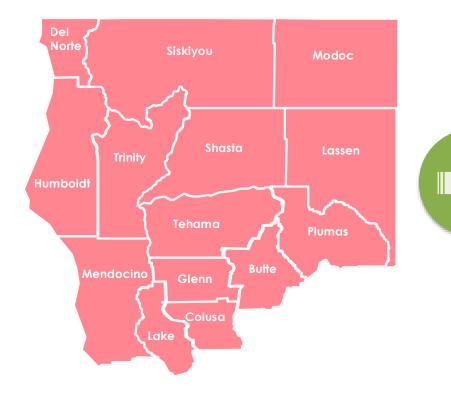
Region 6 La Shonda Diggs, Division Chief Winna Crichlow, Division Chief Olga Vicuna, Division Chief Los Angeles



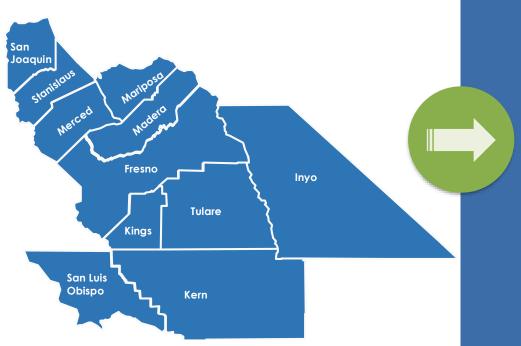
County/Director	Yay	Nay
Alameda Andrea Ford		
Contra Costa Marla Stuart		
Marin Kari Beuerman		
Monterey Lori Medina		
Napa Jennifer Yasumoto		
San Benito Tracey Belton		
San Francisco Trent Rhorer		
San Mateo Ken Cole		
Santa Clara Angela Shing		
Santa Cruz Randy Morris		
Solano Kelley Curtis		
Sonoma Angela Struckmann		



County/Director	Yay	Nay
Alpine Nichole Williamson		
Amador Anne Watts		
Calaveras Cori Allen		
El Dorado Olivia Byron-Cooper		
Mono Kathy Peterson		
Nevada Rachel Peña		
Placer Greg Geisler		
Sacramento Ethan Dye		
Sierra Lori McGee		
Sutter David Nagra		
Tuolumne Rebecca Espino		
Yolo Soua Moua		
Yuba Jennifer Vasquez		



County/Director	Yay	Nay
Butte Shelby Boston		
Colusa Elizabeth Kelly		
Del Norte Ranell Brown		
Glenn Bill Wathen		
Humboldt Connie Beck		
Lake Crystal Markytan		
Lassen Laura Atkins		
Mendocino Bekkie Emery		
Modoc Tom Sandage		
Plumas Neal Caiazzo		
Shasta Dwayne Green		
Siskiyou Patricia Barbieri		
Tehama Laura Hawkins		
Trinity Liz Hamilton		



County/Director	Yay	Nay
Fresno Sanja Bugay		
Inyo Marilyn Mann		
Kern Lito Morillo		
Kings Wendy Osikafo		
Madera Deborah Martinez		
Mariposa Joseph Lynch		
Merced Yvonnia Brown		
San Joaquin Chris Woods		
San Luis Obispo Devin Drake		
Stanislaus Christine Huber		
Tulare Francena Martinez		



County/Director	Yay	Nay
Imperial Paula Llanas		
Orange An Tran		
Riverside Sayori Baldwin		
San Bernardino Gilbert Ramos		
San Diego Richard Wanne		
Santa Barbara Daniel Nielson		
Ventura Melissa Livingston		

County/Director	Yay	Nay
Los Angeles Michael Sylvester		
Los Angeles Roxana Molina		
Los Angeles Cynthia McCoy-Miller		



CalSAWS Member Representatives Informational Item



Member Representatives Informational Item

- Pursuant to the JPA Agreement Article II, Section 2.04 (b) the State shall have the right to select a representative to serve on the Board as the Ex-Officio representative of the State.
 - a) Introduce Director of OSI, Adam Dondro, as the Ex-Officio representative of the State.

State Ex Officio JPA Board Representative

Adam Dondro

California Office of Systems Integration May 2022 – Current



CalSAWS JPA Board Action Items



Action Items

- Pursuant to the JPA Agreement, Article III, Section 3.01, the Board of Directors shall elect from among its Directors, a Chair and Vice-Chair.
 - a) Seek nominations and creation of slate for Board of Directors Chair and Vice-Chair for the period of July 1, 2023 through June 30, 2024.
 - b) Proceed to elect the Chair and Vice-Chair for the period of July 1, 2023 through June 30, 2024.
- Approval of SFY 2023/24 CalSAWS Project Budget including CalSAWS Implementation Advance Planning Document (IAPD) Update, CalWIN M&O Operational Advance Planning Document (OAPD) Update, County Purchases/Separate Services, Premise Item Funding, and the Administrative Budget for Unfunded costs.

CalSAWS JPA Board Action Items Action Items

In accordance with the JPA Agreement, Bylaws, and MOU, the Board must Adopt an Annual Budget

CalSAWS JPA Agreement -Section 2.09. Annual Budget

The Board shall adopt an annual budget for each Fiscal Year. The Bylaws shall further provide for the presentation and content of the budget.

CalSAWS Bylaws, Section IX BUDGET AND FISCAL REPORT, A. Annual Budget

The Board shall adopt an annual budget for each Fiscal Year, which shall first be provided to each Member Representative. The Consortium Executive Director shall oversee the preparation of the Budget.

CalSAWS MOU, Section IV MUTUAL RESPONSIBILITIES

4.1 Fiscal Responsibilities and Claiming

4.1.4. Administrative Costs (also known as unfunded costs) are costs properly incurred by the Consortium but designated by the State of California as ineligible for reimbursement... On or before April 1 of each year, the Consortium, with the concurrence of the Consortium's Member representatives as defined in Section 2.07 (Quorum; Required Votes; Approvals) of the JPA Agreement, will approve a schedule of Administrative Costs for the upcoming fiscal year (July 1 through June 30).

CalSAWS JPA Board Action Items Action Items

The CalSAWS Annual Project Budget includes all Funding Categories



Baseline Project Funding CalSAWS and CalWIN APDUs



County Purchases and Separate Services



Policy Enhancements Premise



Administrative (Unfunded)

Insurance, Audits, Fiscal Agent Services, and Accounting System Access (Approved by the General Membership January 26, 2023)

CalSAWS JPA Board Action Items CalSAWS Project Budget

CalSAWS Project Budget - FY 2023-24	TOTAL	CalSAWS Project Budget - FY 2023-24	TOTAL
CalSAWS DD&I / M&O	\$352,277,712	CalSAWS - Global Telephonic Signature	\$6,000,000
CalSAWS - County Purchases	\$10,512,058	CalSAWS - HAP Eviction (SB 1083)	\$500,000
CalSAWS - Administrative	\$651,567	CalSAWS - Healthy Futures for Foster Youth	\$423,085
CalSAWS - ABAWD Automation	\$923,521	CalSAWS - Medi-Cal Recipient Text Messaging	\$5,324,558
CalSAWS - American Recovery Plan Act (ARPA) FFY 2023	\$3,206,654	CalSAWS - Medi-Cal Renewal Packet Printing	\$356,300
CalSAWS - Automation Updates Premise	\$1,765,900	CalSAWS - New Required Notices and STAT 47 Report Modification	\$248,431
CalSAWS - BenefitsCal Parity with GetCalFresh	\$3,000,000	CalSAWS - NOA Back Nine Revisions	\$255,000
CalSAWS - CalFresh Disaster Application Revision	\$274,639	CalSAWS - PHE Additional Contact Attempt	\$1,518,750
CalSAWS - CalFresh Discontinuance of Gambling Wins	\$341,888	CalSAWS - Prepopulated Medi-Cal Redetermination Forms	\$5,725,281
CalSAWS - CalFresh Military Housing Allowance Disregard (SB 950)	\$500,000	CalSAWS - Reimbursement for Food Benefit Theft Automation	\$2,201,329
CalSAWS - CalFresh Notice of Denial or Pending Status	\$428,815	CalSAWS - Resume Pre-Pandemic Medi-Cal Operations	\$721,361
CalSAWS - CalFresh Notices of Action (NOAs) Updates Tracking	\$175,088	CalSAWS - SAWS Shared Application Forms Revision	\$3,213,761
CalSAWS - CalFresh Periodic Report (SAR 7 Reminder)	\$2,340,370	CalSAWS - SB 1341 Medi-Cal Automation	\$5,907,718
CalSAWS - CalFresh Public Assistance Definition Alignment	\$607,003	CalSAWS - Stage One Continuous Eligibility - Automation	\$288,144
CalSAWS - CalFresh Recertification Application Revision	\$515,858	CalSAWS - Transitional Housing Supplement	\$89,700
CalSAWS - CalFresh Reinstatement Approval & Denial Notice Revisions	\$608,304	CalSAWS - Transitional Nutrition Benefits Recertification Hold (Auto)	\$197,732
CalSAWS - CalFresh Simplifications	\$881,811	CalSAWS - Undocumented 26-49 Full Scope Medi-Cal Expansion	\$471,500
CalSAWS - California Food Assistance Program (CFAP) Expansion*	\$38,500,000	CalSAWS - Welfare Data Tracking Impl. Project (WD11P)	\$13,946,925
CalSAWS - Cal-OAR Modifications including Customer Satisfaction Survey	\$684,309	CalSAWS - Work Registration CalFresh Disqualification Notice Update	\$176,000
CalSAWS - CalWORKs Child Support Pass-through to Families	\$546,000	CalWIN - M&O	\$42,023,419
CalSAWS - CalWORKs Overpayments (SB 726)	\$207,000	CalWIN - Separate Services	\$366,153
CalSAWS - CalWORKs Reminder Notice at Redetermination	\$121,000	Total	\$542,187,171
CalSAWS - CalWORKs Work Requirements (AB 2300)	\$1,000,000		
CalSAWS - Continuum of Care Automation	\$1,000,000	Revenues	
CalSAWS - Extend Medi-Cal Suspension for Incarcerated Adults	\$1,272,236	Intergovernmental	\$542,187,171
CalSAWS - Family Reunification (AB 135)	\$1,937,000		
CalSAWS - Foster Care Eligibility Determination (FCED)	\$2,953,291	Expenditures	\$542,187,171
CalSAWS - Foster Care Eligibility Determination (FCED) - Interface	\$25,000,000	Service and supplies	\$374,056,784
* CalSAWS portion of the funding is TBD		Capital outlay	\$168,130,387

Funding aligns to the May Revise. Subsequent Advance Planning Documents (APDs) and allocations will determine actual authority to spend.

Action Items

- 8. Consent Calendar
 - a. Approval of the May 12, 2023, JPA Board Meeting Minutes
 - b. Approval of Deloitte Portal/Mobile Change Order No. 7, which includes an administrative adjustment related to optional enhancements deliverable due dates. This change does not impact total contract value.
 - c. Approval of Deloitte Implementation Support Services (ISS) Change Order No. 3, which includes an administrative adjustment of a deliverable payment month. This change does not impact total contract value.

Action Items

8. Consent Calendar

- d. Seeking Board authorization for the completion of Signature/Fund Custodian Authorization Forms required by San Bernardino County Auditor-Controller/Treasurer/Tax Collector for State Fiscal Year 2023/24:
 - i. Approve the completion of the form in the name of the CalSAWS Chair, authorizing the Chair to approve payments to be made by the Controller for CalSAWS.
 - ii. Approve the completion of the form in the name of the CalSAWS Vice-Chair, authorizing the Vice-Chair to approve payments to be made by the Controller for CalSAWS.
 - iii. Approve completion of the form in the name of the CalSAWS JPA Secretary, authorizing the JPA Secretary to approve invoices to be paid by the Controller for CalSAWS.
 - iv. Approve completion of the form in the name of CalSAWS Section Director, Holly Murphy, authorizing Holly Murphy to approve invoices to be paid by the Controller for CalSAWS, in the absence of the CalSAWS JPA Secretary. (Continued on next page.)

Action Items

- 8. Consent Calendar (Continued from previous page.)
 - d. Seeking Board authorization for the completion of Signature/Fund Custodian Authorization Forms required by San Bernardino County Auditor-Controller/Treasurer/Tax Collector for State Fiscal Year 2023/24:
 - v. Approve completion of the form in the name of CalSAWS Section Director, Laura Chavez, authorizing Laura Chavez to approve invoices to be paid by the Controller for CalSAWS, in the absence of the CalSAWS JPA Secretary.
 - vi. Approve completion of the form in the name of CalSAWS Section Director, Thomas Hartman, authorizing Thomas Hartman to approve invoices to be paid by the Controller for CalSAWS, in the absence of the CalSAWS JPA Secretary.
 - vii. Approve completion of the form in the name of CalWIN/WCDS Executive Director, Diane Alexander, authorizing Diane Alexander to approve invoices to be paid by the Controller for CalSAWS, in the absence of the CalSAWS JPA Secretary.
 - viii. Approve completion of the form in the name of Director Diana Alexander, authorizing Diana Alexander to approve invoices to be paid by the Controller for CalSAWS.

CalSAWS JPA Regions



Approval of Consent Items

Region	Board Member	Yay	Nay
State	Adam Dondro		
1	Marla Stuart		
1	Tracey Belton		
2	Rachel Peña		
3	Bekkie Emery		
4	Deborah Martinez		
4	Chris Woods		
5	Gilbert Ramos		
5	Sayori Baldwin		
5	An Tran		
6	Michael Sylvester		
6	Roxana Molina		
6	Cynthia McCoy-Miller		

Member Representatives Informational Items



CalSAWS Annual Audit Summary

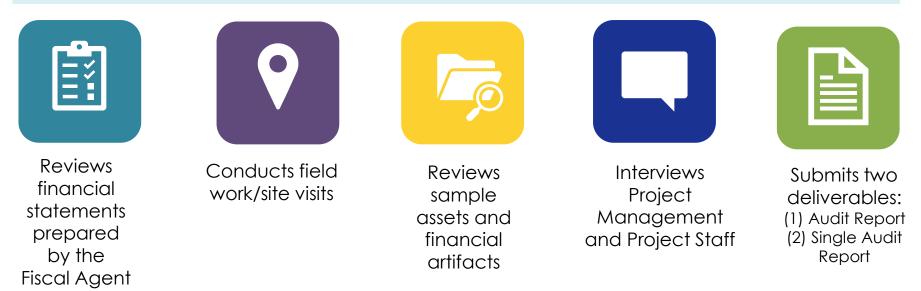


Annual Audit CalSAWS Annual Audit Findings

The annual financial audit is conducted in accordance with the JPA Agreement

Section 2.10. Annual Operational and Fiscal Reports. The Board shall cause an annual operational report and annual fiscal report to be prepared and provided to each Member Representative.

Independent auditors are selected through a procurement process. The Independent Financial Auditor:



Annual Audit CalSAWS Annual Audit Findings



Audited CalSAWS Year Ending June 2022 Single Audit Report and Financial Statements

Results

There were **no audit findings**, and the auditors found **no instances of noncompliance** which could have had a direct and material effect on our financial statement amounts.

The auditors further found that the financial statements "**present fairly**, in all material respects, the respective financial position of the governmental activities and the general fund," of the Consortium. **The auditors made no recommendations**.

These documents were distributed via CIT 0141-23 and are available on the CalSAWS website (<u>www.calsaws.org</u> / public information)

June Production Outages



CalSAWS Application Interruption 6/7

- CalSAWS Application experienced an issue that resulted in Users being unable to login to CalSAWS, BenefitsCal, Contact Center, and on 6/7/2023 starting at 12:19 pm.
- CalSAWS restarted the database server and restored service at 2:00 pm on 6/7/2022
- CalSAWS services were impacted for 1 hour and 41 minutes
- There was a reoccurrence of the issue the evening of 6/7 which then caused the team to repoint CalSAWS to the standby database

Remediation Completed

- Root cause was identified and remediated
- Changes were implemented across production and non-production environments
- The team switched back to the primary database on Sunday, 6/18

CalSAWS Access (Forge Rock) Interruption 6/20

- CalSAWS Forge Rock experienced an issue that resulted in Users being unable to login to CalSAWS, BenefitsCal, Contact Center, OCAT, Imaging, PRT, Training, LMS, and all ForgeRock connected interruption on 6/20/2023 starting at 10:55 am.
- CalSAWS invoked fail-over activities and moved the Forge Rock services to our alternate site at 12:41 pm on 6/20/2022
- CalSAWS services were impacted for 1 hour and 46 minutes

Remediation Completed:

- Root cause analysis completed and triggering action identified
- Failed back to primary site on 6/23
- Alert thresholds modified to provide additional time for analysis before services are impacted
- Operational processes modified to initiate failover to alternate site earlier in the incident management process to restore services faster

Remaining Actions:

 Implement additional architectural changes based on recommendations provided by ForgeRock vendor

CalSAWS Cyber Attack - 6/23

- CalSAWS ForgeRock experienced a DoS cyber attack starting at 6pm on Thursday, 6/22
 - BenefitsCal started scheduled outage for maintenance at 8pm on Thursday and remained down until changes were made to ForgeRock to block the IPs involved.
 - ForgeRock services became unavailable at 9:30pm PDT, which caused an unscheduled outage for all applications
- All applications were brought up at 11:34pm on Thursday, 6/22
- ForgeRock and subscribing services / application were impacted with full outage for 2 hour and 4 minutes
- No data was compromised by the attack and system integrity was maintained
- 4,611 BenefitsCal user accounts were restored by 9pm, Friday, 6/23, as a result of cleanup activities that were necessary after the cyber attack was thwarted

Remediation Completed:

 CalSAWS security analyzed the attack patterns and additional changes were made to the Network and ForgeRock architecture to stop the attack Thursday night

Remaining Actions:

• Implement additional architectural changes based on recommendations provided by ForgeRock and AWS vendors to further harden the ecosystem

Wave 3 Retrospectives



Retrospective Approach Multifaceted



Reflecting from multiple viewpoints:

- 1. Project team sessions focus on internal observations and enhancement opportunities.
- 2. County sessions capture input directly from counties based on their migration experience.
- **3. Stakeholder session** focused on public facing aspects of the CalSAWS migrations.

Wave 3 – Project Retrospectives Focus & Action



Focus:

- What worked
- Opportunities for improvement
- Recommended action

Action:

- Realtime adjustments
- Adjustments in progress

Session Topics Include:

- ISS Implementation (Pre and Post)
- Organizational Change Management
- Training
- TOSS/Support Teams
- County Data Validation (County)

- Contact Center
- Imaging
- Lobby Management
- Conversion
- BenefitsCal Communication & Resources

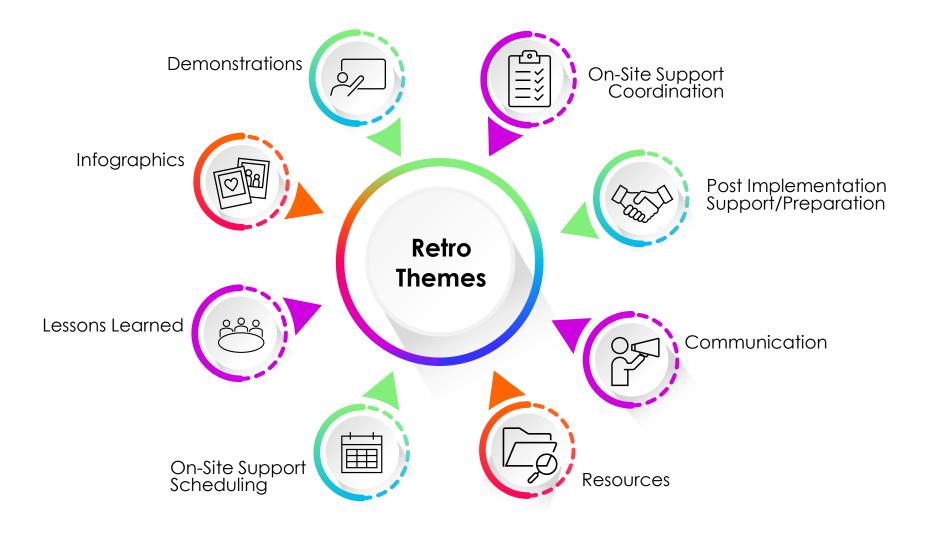
Themes & Changes Lessons Learned from Wave 3

Today, we will cover:

- 1. Retrospective themes from teams on opportunities for improvement.
- 2. Changes that counties will see from what we learned with Wave 3.



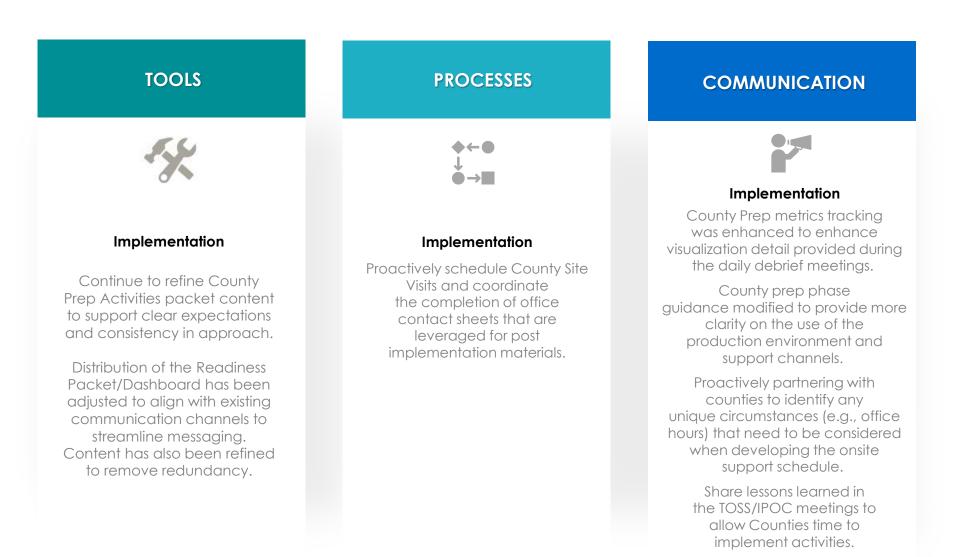
OCM, Training & Implementation Retrospectives Opportunities for Improvement – Themes



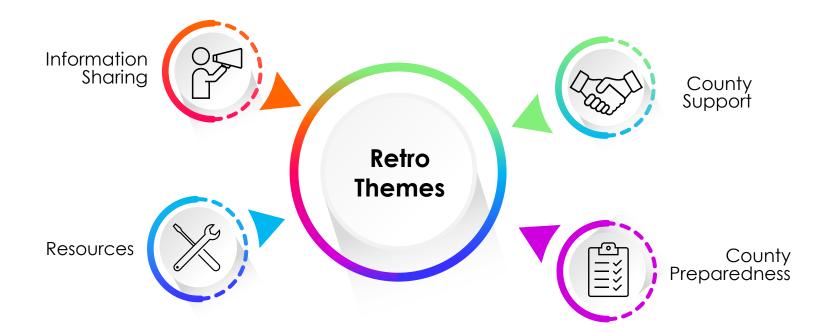
OCM & Training - Changes for Future Waves

TOOLS	PROCESSES	COMMUNICATION
×	♦←● ↓ ●→■	
<section-header>OCMStaluating topics and priority order for demos based on county input.Image: Demonstration of the process refined to process refined to incorporate flexibility for counties to use in ways that best fit internal processes.</section-header>	<text><text><text></text></text></text>	Definition Assessing additional infographics that can be distributed to clerical staff and other stakeholder groups to support county preparedness. Reassessing communication is products (videos vs ppt) to broaden topics and broaden topics.

Implementation – Changes for Future Waves



Contact Center & Imaging Retrospectives Opportunities for Improvement – Themes



Contact Center & Imaging - Future Wave Changes

TOOLS	PROCESSES	COMMUNICATION
S.	◆←● ↓ ●→■	
Contact Center Implemented On Site day for Model Office Prep 3 full weeks are now available of Model Office (previously 10 days).	Contact Center The team is exploring opportunities to further expose county staff to the admin page roll on/off staff profiles functionality.	Contact Center The Pre-Model Office Presentation deck continues to be refined and has been adjusted to include additional content on porting a Toll-Free Number
Imaging BPR sessions are being scheduled earlier than prior waves to provide adequate time communicate and		and lessons learned from prior waves. Imaging Continuing to refine content i functionality demos and BPR
support the counties with vorkstation/scanning testing.		sessions based on lessons learned from county experiences in prior migrations

County Data Validation (CDV) & Conversion Retrospective Opportunities for Improvement – Themes

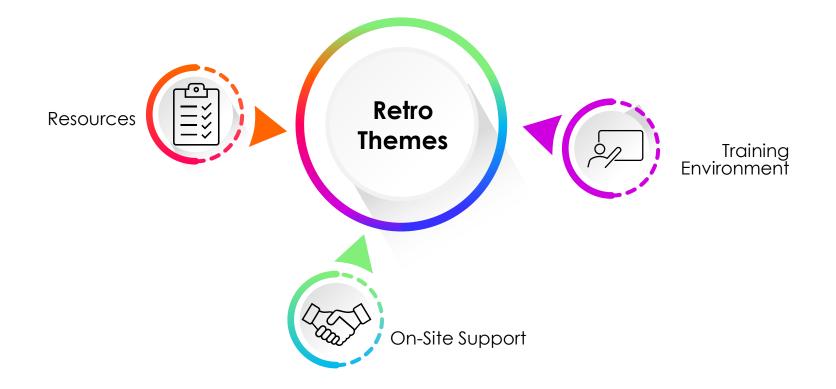


CDV & Conversion - Future Wave Changes

TOOLS	PROCESSES	COMMUNICATION
	♦←● ↓ ●→■	
CDV Case Review scripts have been further refined for CDV, Mock, and Go-live Click- throughs. Enhanced Masked Data	CDV Continuing with real-time Q&A document from Office Hours/Triage meetings published and updated	CDV Enhanced Kickoff meeting to include demos and walk throughs. Continue to enhance &
Reference Guide to include Other Health Care and claims masked data rules. Conversion County Click through materials	daily. Conversion Increasing frequency of touchpoints for county click through participants from	socialize the CDV Findings Reference Guide. Further emphasized availability of the mapping transformation product.
refined to further define expectations for C cutover. Additional county scripts developed for Shell Cases and Closed Cases to better prepare counties for click through activities.	once to twice a weekend to provide flexibility requested by the Counties and project teams.	Conversion Conversion notification frequency adjusted from milestone only to every 2 hrs. to provide more timely updates.

BenefitsCal Retrospective

Opportunities for Improvement – Themes



BenefitsCal – Future Wave Changes

TOOLS COMMUNICATION **PROCESSES BenefitsCal BenefitsCal** The BenefitsCal Training **BenefitsCal** environment is now available Developing guidance on Continued refinement of the onfor Counties & CBOs to how to add the mobile site support schedule, with each support training needs a device short cut to share wave, to maximize benefit to the promote awareness. with Counties. counties. Developing/evolving Number of individuals deployed Account Link resources to for on-site support increased provide more clarity. between Waves 2 & 3 and will be reviewed for Wave 4 to provide coverage for longer periods of Exploring options to provide time. training/resources to reception staff to support awareness and increase adoption.

Wheel of CalSAWS



Future Wave Readiness

- Waves 4-6 Readiness
- Waves 5 and 6 Risk Summary



Executive Summary: Wave 4 – 6 Readiness Project Readiness Areas and Categories [as of 6/23/2023]

Readiness Area*	Readiness Category	Wave 4	Wave 5	Wave 6
	Deploy CalSAWS Releases 23.0#	С	G	NS
	Contact Center Readiness	G	G	G
Application	Imaging Readiness	G	G	Y
	BenefitsCal Readiness	G	G	NS
	Central Print Readiness	G	G	G
Integration	County Interface Partner Test (IPT)Execution	С	Y	NS
Integration	State Interface Partner Test (IPT) Execution	С	С	NS
Conversion &	Defects Resolution	Y	G	NS
	EDBC Match – Auto Review Rates	С	G	NS
CalWIN Migration	Mock Cutover	С	G	NS
Planning	Cutover Window	С	Y	NS
Taabaiaal	County Network Connectivity	С	С	G
Technical	Performance Testing	G	G	G
Training	Wave County Classroom Set-Up	С	G	NS
i annig	WBT Training Delivery	G	G	G
	ILT Training Delivery	С	G	NS
	Change Discussion Guides (CDGs)	С	С	С
	Communications	G	G	G
Organization	Business Process Reengineering	С	С	С
	Configuration	С	G	G
	Process Simulation	С	G	NS
	Implementation Planning	G	G	G
	County Prep	G	G	NS
Implementation	Pre and Post Implementation Support	G	G	G
	Help Desk	С	G	G
	County Ad Hoc Reports	Y	Y	Y

County Readiness Summary: Wave 4, 5, and 6 County Readiness [as of 6/23/2023]

		Wave	e 4				Wave 5				Wave 6	
Readiness Area	San Diego	San Mateo	Santa Cruz	Solano		Alameda	Fresno	Sonoma		Sacramento	San Luis Obispo	San Francisco
Application	G	G	G	G		G	G	G		Y	G	G
Integration	С	С	С	С		Y	G	G		G	G	G
Conversion	G	G	G	G		G	G	G		G	G	G
Technical	С	С	С	С		G	G	G		G	G	G
Training	G	G	G	G		G	G	G		G	G	G
Organizational	G	G	G	G		G	G	G		G	G	G
Implementation	G	G	G	G		G	G	G		G	G	G
				NS	Not S	tarted	G On S	chedule	Y	<14 Days Late	R	>=14 Days Late

Wave 4 County Readiness Checklist Activities by Status (as of 6/26/2023)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	0	82	78	93	70	21	344
NOT STARTED	0	35	42	44	42	32	195
COMPLETED	31	456	491	475	495	110	2058
Total Unique Issues:	31	573	611	612	607	163	2597

Wave 5 County Readiness Checklist Activities by Status (as of 6/26/2023)

Status	00 All Counties	13 Alameda	14 Fresno	15 Sonoma	Wave 5 Counties	T:
IN PROGRESS	2	102	102	94	27	327
NOT STARTED	0	135	144	135	86	500
COMPLETED	8	431	422	426	58	1345
Total Unique Issues:	10	668	668	655	171	2172

Wave 6 County Readiness Checklist Activities by Status (as of 6/26/2023)

Status	00 All Counties	16 Sacramento	17 San Francisco	18 San Luis Obispo	Wave 6 Counties	T:
IN PROGRESS	3	94	82	94	б	279
NOT STARTED	0	184	195	183	152	714
COMPLETED	8	384	390	392	19	1193
Total Unique Issues:	11	662	667	669	177	2186

County Readiness Highlights

Wave 5

 Integration Readiness – County interface development for Alameda is a watch item. Alameda has 2 interfaces still in County development. Anticipated completion date is July 7, 2023.

Wave 6

 Application Readiness – Imaging readiness for Sacramento County is a watch item. The County will provide a cutover plan for their delta images.

Project Risks CalWIN Counties Cutover Readiness Needs Risks

Risk	Risk Name	Wave 4	Wave 5	Wave 6
262	The CalWIN Counties may not be fully prepared for go-live if they do not			
	have sufficient or timely information	Low	Medium	Medium
264	CalWIN County waves may not complete their Imaging migration readiness			
	activities by their designated wave go-live dates	Low	Low	Medium
269	CalWIN Counties may not have enough development and testing timeline			
	to Refactor their Ad-hoc Reports and Ancillary System before Go-Live			
		Medium	Medium	Medium
281	Changes to San Diego County PoP site location resulting in additional effort			
	and costs to complete a parallel enablement	Low		
288	Wave 6 San Francisco County – Delays in Circuit delivery			Medium
289	Transition from CalWIN Lite to CalSAWS - BenefitsCal - Child Care Portal for			
	external partners		Low	

Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk	Risk Name	Wave 4	Wave 5	Wave 6
258	The CalWIN Conversion Cutover Window is at-risk of completing past the 84- hour cutover window	Issue	High	Low
285	Preparing CalWIN counties to operationalize CalSAWS after their Go-Live		Medium	Medium
279	CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS	Medium	Medium	Medium
280	Unresolved Go-Live Dependent defects not resolved prior to the Wave Go- Live could impact County Case Worker business Post Go-Live		Medium	
291	Enhance Conversion Change Management Quality		Medium	
292	Alameda County - Daily Foster Care Voucher Interface		Low	

Project Risks CalSAWS Scalability & System Performance Risks

Risk	Risk Name	Wave 4	Wave 5	Wave 6
237	The scaling of Batch for 58 Counties may have an impact on system performance		Low	Low
284	CalSAWS Contact Center Enhanced Call Control Panel (eCCP) application scalability may impact performance for Los Angeles county call volumes		Low	
240	The scaling of CalSAWS Production Operations, including Batch Operations, to provide 58 County support, without effectively taking into account the multi-county and multi-vendor CalSAWS ecosystem may impact business operations	Medium	Medium	Medium

Release and Policy Updates

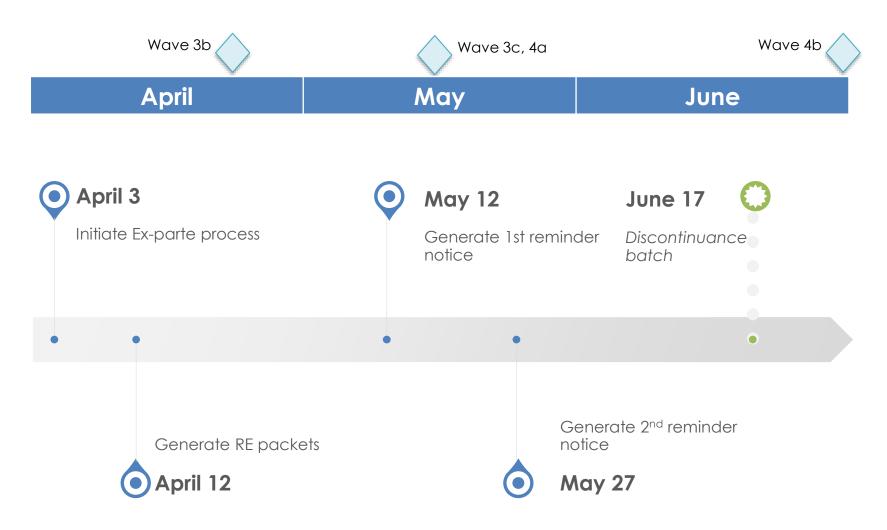
- Continuous Coverage Unwinding
- Upcoming Policy
- BenefitsCal Release Schedule
- Task Management



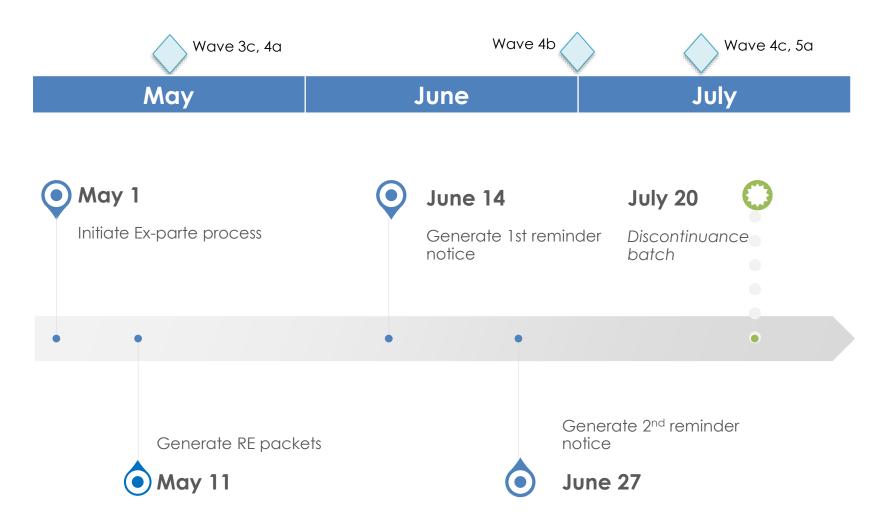
CalSAWS Release and Policy Update Continuous Coverage Unwinding – DHCS Updates

- DHCS Unwinding Eligibility Dashboard was published on Tuesday, June 13 and includes data for the month of March.
 - The dashboard will be posted on the DHCS website monthly on the <u>Medi-Cal Eligibility Statistics</u> page.
- On June 16, 2023, DHCS posted the Continuous Coverage Unwinding County Readiness Plan Summary report on the DHCS Keeping Medi-Cal Beneficiaries Covered <u>webpage</u>.
- United States Department of Health and Human Services Agency call to action.

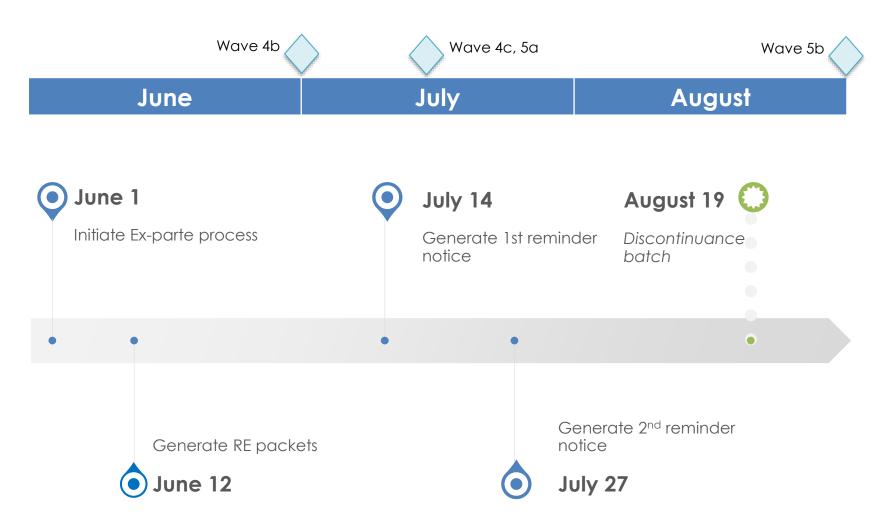
CalSAWS Release and Policy Update Continuous Coverage Unwinding – June Renewals



CalSAWS Release and Policy Update Continuous Coverage Unwinding – July Renewals

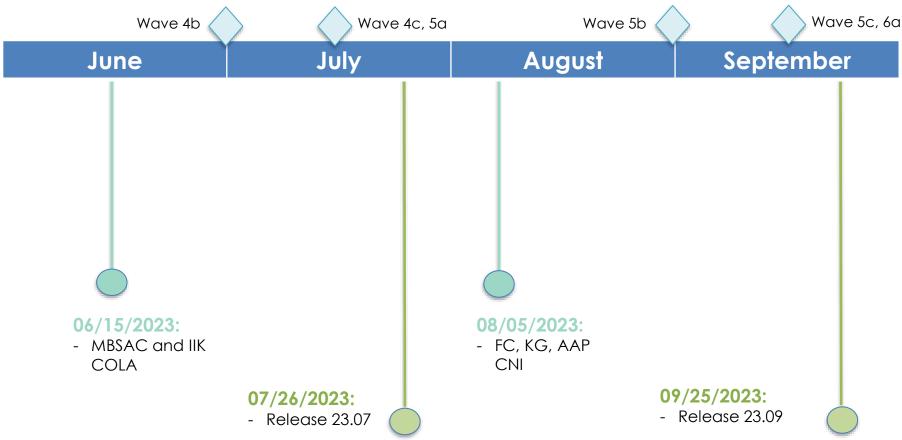


CalSAWS Release and Policy Update Continuous Coverage Unwinding – August Renewals



CalSAWS Release and Policy Update

CalSAWS Release Highlights



Pending: Timing of CF COLA and CW Map increase. More information will be presented in upcoming meetings.

- CalFresh: The CF and D-CF COLAs will be dependent on USDA FNS' release; CDSS anticipates releasing the COLA letter guidance in 9/2023.
- CalWORKs: For MAP, we anticipate a 3.6% increase to the MAP levels. Draft of letter expected Mid-August with posting in September.
- For IRT, draft letter should be expected around late July with a posting late August/early Sept.

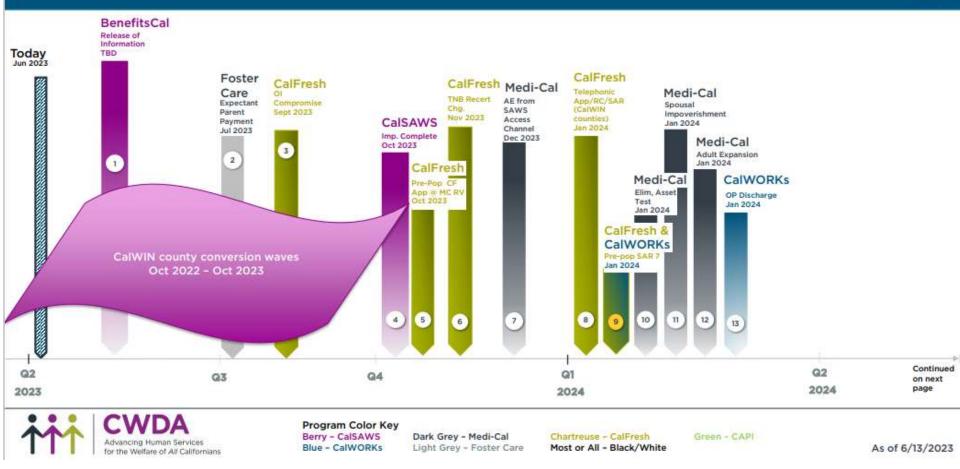
CalSAWS Release and Policy Update CalSAWS Release Highlights - CalFresh

- Disaster CalFresh Wave 4
 - Impacted Counties: Butte
 - Benefit period: February 21, 2023, through March 22, 2023
 - Application Period:
 - + Tuesday, June 20, 2023, to Friday, June 23, 2023
 - + Monday, June 26, 2023
- Disaster CalFresh Wave 4.1
 - Impacted Counties: Humboldt County
 - Benefit period: February 21, 2023, through March 22, 2023
 - Application Period:
 - + Tuesday, June 20, 2023, to Friday, June 23, 2023
 - + Monday, June 26, 2023 to Wednesday, June 28, 2023
- Disaster CalFresh Wave 5
 - Impacted Counties: Santa Clara
 - Benefit period: February 21, 2023, through March 22, 2023
 - Application Period:
 - + Monday, July 10, 2023 to Friday, July 14, 2023
- Disaster CalFresh Wave 6
 - Impacted Counties: San Luis Obispo
 - Benefit period: February 21, 2023, through March 22, 2023
 - Application Period:
 - + Monday, July 10, 2023 to Friday, July 14, 2023

CalSAWS Policy Update Policy timelines

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects

Page 1



CalSAWS Policy Update Timeline Explanation

Notes on the SAWS Policy slide

General Notes:

- The length of bars or size of clouds has no correlation to the size of the effort
- Dates on policy items represent target implementation date in statute, where one exists. Automation dates may be earlier or later, depending on many factors, including
 when complete policy is issued, including NOAs and forms in all threshold languages
- Orange shading of number circle indicates items that are not currently on track to be automated by the target date
- Clouds represent areas where timing is less certain and may not correlate to the timeline

Specific Notes and Key to Acronyms:

1 - Implementation of BenefitsCal Release of Information functionality was paused to allow resolution of policy questions and operational concerns and to confirm alignment between CDSS and DHCS on policy.

2 - Last year's budget included an Expectant Parent Payment for foster youth, which is required to be implemented manually by January 2022, and automated in CaISAWS by July 2023.

3 - A new CalFresh overissuance compromise policy will be effective September 1, 2023.

4 - The CalWIN counties will begin migrating to CalSAWS in October 2022, and the last wave will migrate in October 2023.

5 - Last year's budget included the creation of a pre-populated CalFresh application to be sent to apparently eligible Medi-Cal recipients upon Medi-Cal renewal. This will become available for counties in CalSAWS in January 2022 and will be provided for CalWIN counties as they migrate, with the process applying to all counties by October 2023.

6 - A prior budget included a change in the TNB renewal cycle from 6 months to 12 months. This will be implemented in November 2023.

7 - Accelerated Enrollment for MAGI Medi-Cal from the SAWS access channel is anticipated to begin in December 2023.

8 - Last year's budget included a requirement for LA and the C-IV counties to implement a telephone-based service model for CalFresh no later than January 2023 (completed), and for CalWIN counties to implement no later than January 2024.

9 - A prior budget included the creation of a pre-populated SAR7 for CalFresh and CalWORKs, which was targeted for implementation January 1, 2024, however, due to delayed policy guidance, the implementation date will be delayed. CalSAWS will assess the new implementation date once policy has been released.

10 - Last year's budget eliminates the Medi-Cal asset limit as of January 1, 2024.

11 - CalSAWS is planning to automate spousal impoverishment provisions as of January 2024.

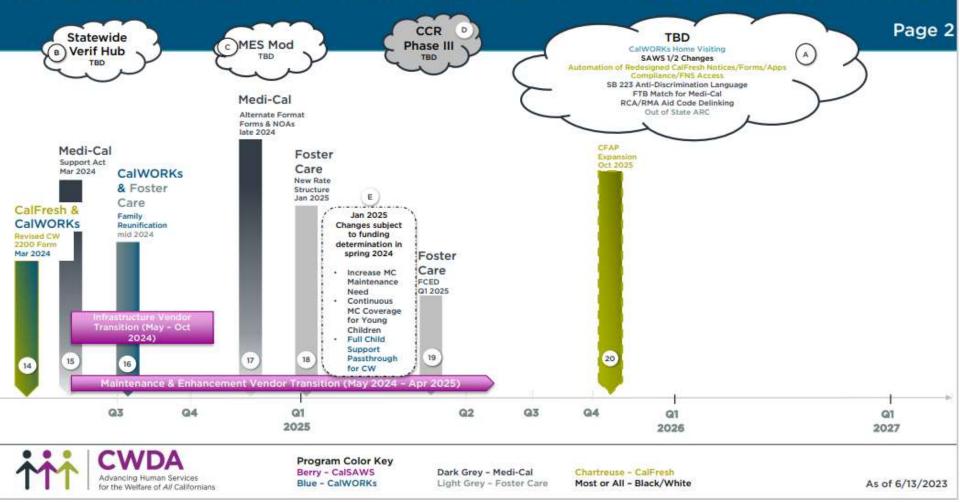
12 - The budget includes the expansion of Medi-Cal to adults 26-49, without regard to immigration status, no later than January 1, 2024.

13 - CalSAWS is planning to automate the discharge of non-fraudulent CalWORKs overpayments when the responsible individual has been off CalWORKs for 36 consecutive months in January 2024.



CalSAWS Policy Update Policy Timelines

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects



CalSAWS Policy Update Timeline Explanation

Notes on the SAWS Policy slide, continued

General Notes:

- The length of bars or size of clouds has no correlation to the size of the effort
- Dates on policy items represent target implementation date in statute, where one exists. Automation dates may be earlier or later, depending on many factors, including
 when complete policy is issued, including NOAs and forms in all threshold languages
- Orange shading of number circle indicates items that are not currently on track to be automated by the target date
- Clouds represent areas where timing is less certain and may not correlate to the timeline

Specific Notes and Key to Acronyms:

14 - CalFresh and CalWORKs are anticipating automation of a revised CW 2200 form in March 2024.

15 - CalSAWS is planning to automate the changes to align with the federal Support Act in March 2024.

16 - Depending on when final policy is provided, and the complexity of that policy, CalSAWS is anticipating that automation to support cash payments to families in Family Reunification will be completed in mid-2024.

17 - CalSAWS is anticipating a request from DHCS to automate support for alternate format forms and NOAs and looking to target a late 2024 implementation.

18 - The budget moved the implementation of a new Foster Care rate structure to January 1, 2025. CaISAWS will need the policy letter on the new structure at least a year in advance to allow time for automation.

19 - While the CalSAWS and CARES teams are still working to finalize schedules, CalSAWS is anticipating that FCED functionality will need to be available during the first quarter of 2025.

20 - The May Revision proposes an October 1, 2025, implementation of the CFAP Expansion. If complete and final policy is provided by July 1, 2023, CalSAWS can support this date.

A - Numerous additional policy changes are pending which will require SAWS changes. Most of these are pending policy guidance.

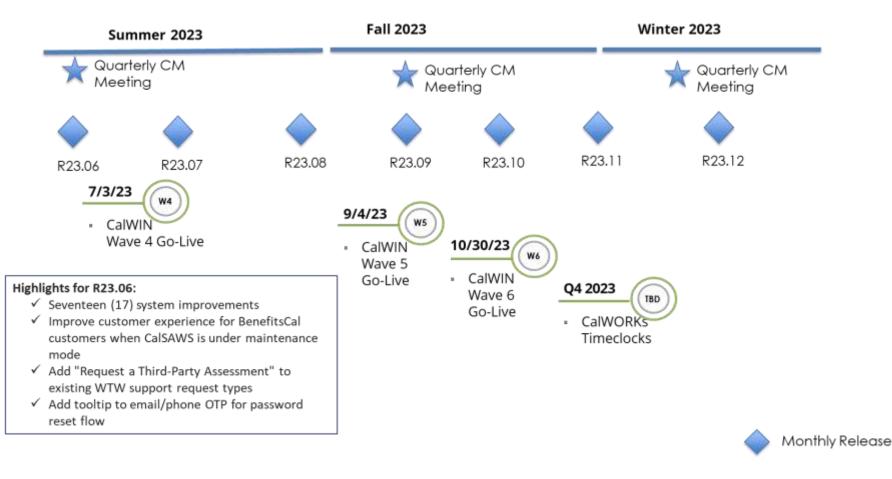
- B HHSA plans to implement a hub that would support electronic verifications for CalWORKs & CalFresh & Medi-Cal.
- C The MES Modernization effort is expected to require significant coordination with SAWS as MEDS is modernized.
- D CCR Phase III is expected to include additional changes to support CCR, primarily changes to reporting.

E - The budget included three policy changes targeted for January 2025 that are subject to a funding determination in spring 2024. Without pre-work, this will not allow sufficient time for automation.

- An increase to the Medi-Cal maintenance need
- Continuous Medi-Cal eligibility for children under age 5
- Full passthrough of child support to CalWORKs recipients



Upcoming Release Calendar



Task Management



Task Management Background



- Counties expressed a desire to enhance the CalSAWS task solution to align with changes to their business processes
- Opportunities for enhanced metrics and task reporting were identified to aid counties in task administration

- A couple of Counties submitted CalSAWS Enhancement Requests (CERs) in late 2022 to update CalSAWS to support their enhanced business
- Work was broken into two phases
- An expedited design and delivery approach is being leveraged to maximize the features being added in each phase

Task Management Expedited Approach

- Workgroup of county representatives is participating in design process
- Workgroup is providing build approval prior to changes being reviewed with committee



- Any additional enhancements from subsequent reviews will be incorporated into future changes
- Requirements are being broken into smaller SCRs to expedite design approval and allow build to begin while next feature is being designed.
- Core application changes and report changes are being worked by separate teams in parallel

Task Management Phase I - Summary

Release 1 – March 23, 2023

• CA-255938 - Automated Actions for Expedited Service and Immediate Need

Release 2 – May 11, 2023

• CA-253348 - Track Time Spent Working Task

Release 3 – May 25, 2023

• CA-253604 - Update Dashboard for Task Mgmt - Part 1

Release 4 – June 22, 2023

• CA-253349 - Get Next Prioritization Configurability

• CA-253347 - Enhance Homepage to Include Additional Task Information

• CA-253605 - Update Dashboard for Task Mgmt - Part 2

Task Management

Phase I – Immediate Need(IN)/Expedited Services (ES) Automated Actions

- Automated Action to be invoked when a CalFresh program is potentially entitled or entitled for ES.
- Automated Action to be invoked when an IN program is assigned on the Pending Assignment List page.

		Edit Close
Action Information		
Name:	Type:	Status: *
CalFresh Program: Expedited Service Entitled	Create Task	Inactive
Program(s):	Run Date:	Source:
CF	Real Time	Online
Scenario:		

Task Management Phase I – Time Tracking

 Configurability for counties to monitor the duration of time from the when work starts to when a task is complete

Task Settings	
*- Indicates required fields	Save Cancel
Description	On/Off
Task Assignment Suggest Worker	○ On ⊛ Off
Bundle Case Tasks	○ On ◉ Off
Get Next Limit	○ On ⑧ Off
Process Document Routing Rules for No Change SAR 7	○ On ⑧ Off
Task Time Record	◉ On ○ Off
	Save Cancel

-6		Task Detail		
	G	Result 1 of 1 - 100	٢	
*- Indicates required field	Is			
Start Task			Save and Return	Save Can
Case Number:	Case Name:	Program(s): *	Status: * Refe	rence Number:
			Assigned V	

Enhanced Task Management Phase I – Homepage

 Added panel to CalSAWS Homepage to assists users by providing a breakout of overdue tasks vs tasks coming due and links to task search page.

▼ My Tasks	
Overdue	<u>8</u>
🔹 Task Category	
Case Update	<u>2</u>
Intake	1
Manual	1 3 2
Time Limits	2
Due in 5 Days	<u>5</u>
🕶 Task Category	
Case Update	1
Intake	1
Manual	1
MEDS Alert	1 1 1
SAR7	1

Task Management Phase I – Get Next Prioritization

 Allows counties to configure what tasks will be distributed from "Get Next" for specific users.

 Indicates required fields 			Save and Return		Cancel
iene	ral Informat	tion			
łam	e: *		Status:		
Orange Task Additional Help			Active 🗸		
Task Type: \star			Begin Date: *	End Date:	
Image Awaiting Review			01/20/2023		
ask	Sub-Type:				
Ast	sociations				
	Level	Number	Name		
Ö	Worker	90WA005LML	Mickey Mouse		
Ö.	Worker	90WA035G5	Donald Duck		
0	Worker	90WA06BBW	Bruce W	ayne	
Rem	iove				Add
Sta	itus History				

Task Management Phase I – Task Dashboard Updates

- Provided enhanced metrics and filtering aimed at giving counties more insight into task processing
- Part 1
 - Added new widgets for task banks
 - Added new case listings tor track tasks in banks
 - Updated columns on Case listings
- Part 2
 - Add Expedited Service and Immediate Need information.
 - Made all tasks filterable by day, week, month, and all organization levels.
 - Provide counts and listings of all tasks in all statuses by day, week, and month.
 - Provide counts of tasks completed before due date and counts of tasks completed after due date.
 - Enable side-by-side comparison by worker, unit, office, and division for average days to complete a task.
 - Provide average transaction time by task category, task type, worker, unit, office, division, and department.

Task Management Phase II and Beyond

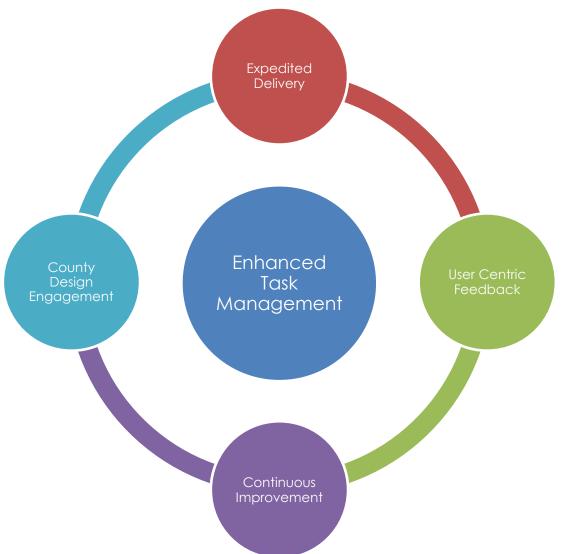
Phase II

- CA-253708 Consolidate Worklist with Task Pop-Up Pages – 23.09
- CA-253667 Configurable Task Categories 23.11
- CA-253669 Appointment and Application Task Routing

Additional Enhancements

- CA-255762 Enhancements to Task Time Tracking
- CA-261531 Enhance Clearance Task to Include Additional Information
- CA-261530 Task Setting for Get Next Task Bank Selection
- CA-261529 Get Next Language Prioritization
- CA-258639 Intake Task Updates

Task Management Highlights



- First features delivered within 3 months of kickoff meeting
- Committee members and SMEs engaged throughout the entire design and delivery process
- User centric feedback was integrated along the way
- A roadmap for continuous improvement was implemented

BenefitsCal Update

- Video Tutorials on YouTube
- Global search enhancement
- Collaboration Model CY23 Update
- Marketing Campaign Phase 2
 overall timeline
- ROI Update



YouTube Tutorials (April 2023)



NEW Tutorials created for the following functionalities based on feedback received from customers:

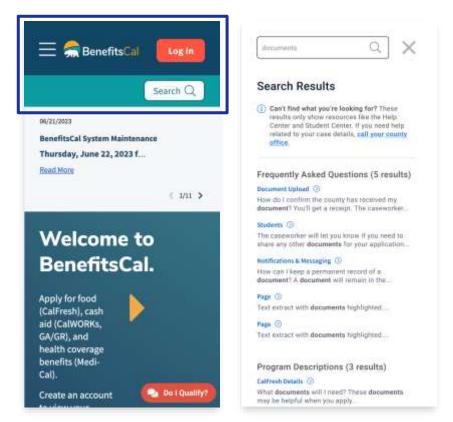
- Verification of Benefits
- Support Request
- Two-Way Messaging and Actions

UPDATED Existing tutorials refreshed to include latest functionality:

- CBO Dashboard
- Customer Dashboard Overview
- How to Upload a Document

Tutorial links are available in the Help Center.

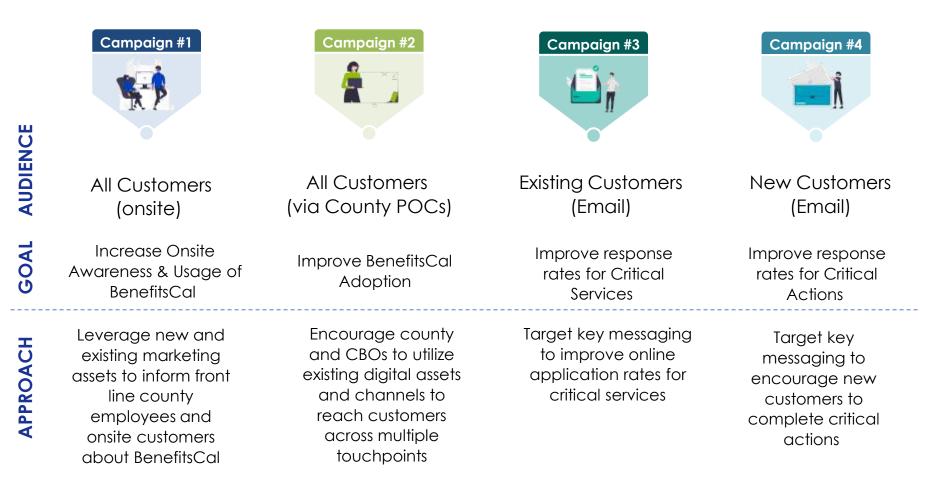
Global Search (Aug 2023)



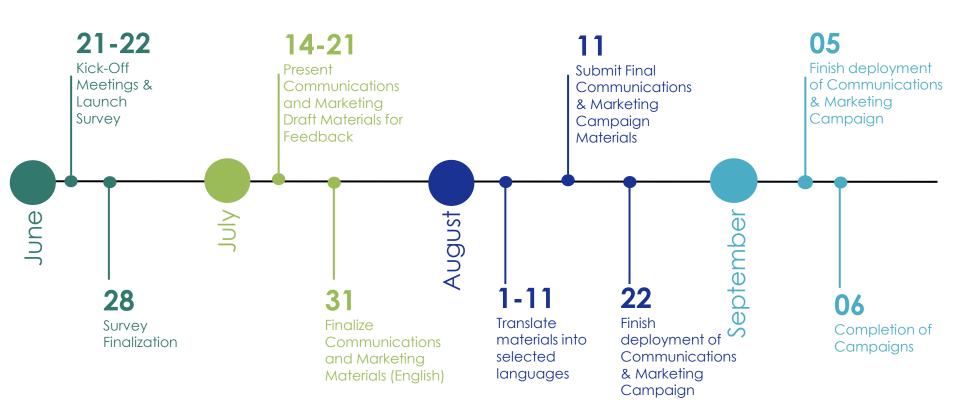
- Allows unauthenticated and authenticated users to search through BenefitsCal help resources
- Displays search results organized by page or section

BenefitsCal Communication and Marketing Campaign Phase 2

Phase 2 of the campaign planning activities started in June 2023



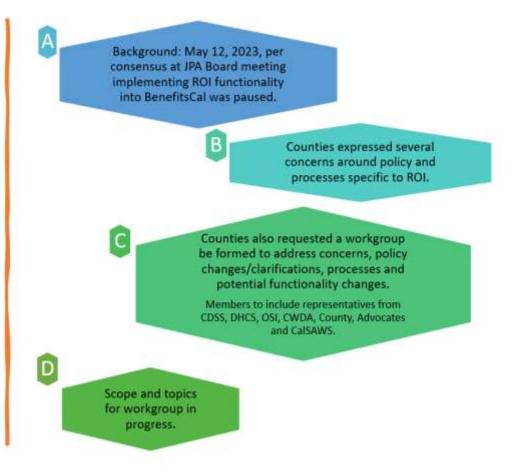
Communication and Marketing Campaign Phase 2 Timeline



Collaboration Model Items Completed in Calendar Year 2023

TYPE	I D	S U M M A R Y	STATUS
Enhancement	CSPM-38745	Update text for Income Change question for the SAR7 and CF37 reports	Completed
Enhancement	CSPM-39560	Update Program Rules page in the Help Center to be consistent with policy .	Completed
Enhancement	CSPM-41680	Add a link to Call Me/Chat Me Feature in the Customer Dashboard	Completed
Enhancement	CSPM-38528	Add nudge for customer to review their tax filing status in MC Renewal flows	Completed
Enhancement	CSPM-64317	Modify YouTube videos to address modified or new changes to BenefitsCal	Completed
Enhancement	CSPM-41363	Provide a nudge for customers to verify their mailing address	Completed
Enhancement	CSPM-64319	Add direct links to alternate options to apply for assistance on the outage page in BenefitsCal	Completed
Enhancement	CSPM-64321	Report a Change: address the problem of people not being able to upload a	Completed
	verification for a new HH member.		Completed
Enhancement	CSPM-41222	Several enhancements logged where the word "application" in the document upload	
		just needs to be changed to "renewal".	Completed
UCD Research	CSPM-64316	Need a greater "space" / "real estate" for announcements so it's not easily glossed over	Completed
		Research for CM Enhancement: Add information/menu/ point of access for non-app features	
UCD Research	CSPM-64318		Completed
		Website Functionality: Move the search bar to the main page of the BenefitsCal website.	
UCD Research	CSPM-64320	Add option for primary applicant to apply for no programs .	Completed
UCD Research	CSPM-35858		Completed

Release of Information (ROI)



DEI Update



JPA Member Representatives Meeting June 2023 – CalSAWS IDEA Update



Virtual Assistant Demo



Worker-Facing Virtual Assistant Overview

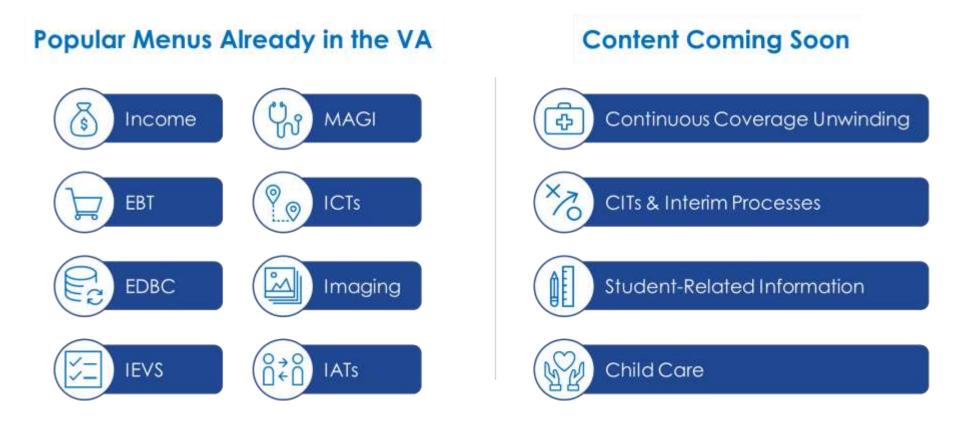
The Virtual Assistant (VA) allows CalSAWS workers to access a series of **pre-defined questions and answers** designed to provide information on CalSAWS functionalities and instructions on how to perform certain job functions. The Virtual Assistant will be **updated every month** with new content largely based on user feedback.



Worker-Facing Virtual Assistant Demo

Let's watch the pre-recorded Virtual Assistant demo video!

Worker-Facing Virtual Assistant Content Roadmap



Worker-Facing Virtual Assistant Statistics

Data from 2/20 Initial Launch through 6/23 12AM



Procurement Update



CalSAWS M&O Procurement Key Procurement Tasks

	M&O Procurement Event	Date	
1	Release RFP	July 6, 2022	
2	Business Proposal Due Date	January 4, 2023	
3	Price Proposal Due Date	January 18, 2023	
4	Evaluate Administrative Compliance and Firm Qualifications	January 5 – 31, 2023	
5	Evaluate Business Proposals	February 1 – July 7, 2023	
6	Conduct M&E Oral Presentations and Key Staff Interviews	June 27 – 29, 2023	
7	Conduct Infrastructure Oral Presentations and Key Staff Interviews	April 17 – 21, 2023	
8	Evaluate Price Proposals	April 26 – July 17, 2023	
9	Conduct M&E Confidential Discussions	August 2 – 3, 2023	
10	Conduct Infrastructure Confidential Discussions	June 6 – 8, 2023	
11	Issue BAFO Instructions	August 10, 2023	
12	Best and Final Offer (BAFO) Due Date	August 29, 2023	
13	Evaluate BAFOs	August 30 – September 20, 2023	
14	Evaluate Consolidated Price Proposals	September 25 – October 4, 2023	
15	Notify Bidders and Prepare for Agreement Exception Discussions	October 10 – 17, 2023	
16	Conduct Agreement Exception Discussions	October 18 – 30, 2023	
17	Issue Price BAFO #2 Instructions	November 6, 2023	
18	Price BAFO #2 Due Date	November 20, 2023	
19	Evaluate Price BAFO #2	November 21 – December 6, 2023	
20	Conduct Final Evaluation Teams Meeting	December 12, 2023	
21	Prepare, Review and Approve Vendor Selection Report	December 13, 2023 – February 7, 2024	
22	Issue Notice of Intent to Award	February 8, 2024	
23	Prepare for and Conduct Contract Negotiations	February 9 – March 8, 2024	
24	State, Federal and JPA Contract Approvals	March 11 – June 28, 2024	
25	Contingency Period	July 1 – 31, 2024	
26	Contract Start Date	August 1, 2024	

BenefitsCal Reprocurement Key Procurement Tasks

	Procurement Event	Dates
1	Prepare RFP	January 4, 2023 – January 16, 2024
2	Develop Requirements	March 6 – June 5, 2023
3	Consortium, Stakeholder and State Review of Requirements	June 6 – August 4, 2023
4	Consortium, Stakeholder, State and Federal Reviews and Approval of the RFP	January 17 – May 28, 2024
5	Release RFP	May 29, 2024
6	Proposals Due	July 30, 2024
7	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
8	Vendor Selection Report Preparation and Approvals	February 6 – March 18, 2025
9	Publish Notice of Intent to Award and VSR	March 19, 2025
10	Contract Negotiations	March 24 – April 3, 2025
11	State Contract Approval	April 4 – May 8, 2025
12	Federal Contract Approval	May 9 – July 14, 2025
13	Contingency Period	July 15 – August 18, 2025
14	JPA BOD Approval	August 22, 2025
15	Contract Start	September 2, 2025
16	Transition-In Period	September 2, 2025 – February 27, 2026

CalSAWS Procurement Changing The Way We Buy AWS Services

- New AWS Contract through the Master Intergovernmental Cooperative Purchasing Agreement with OMNIA Partners (formerly National Cooperative Purchase Alliance)
 - Submission for State review: May 31, 2023.
 - State and Federal Review: June 1 July 31, 2023.
 - JPA Approval planned for August 18, 2023 for an effective date of September 1, 2023.

January Meeting of the CalSAWS JPA Member Representatives



January 2024 CalSAWS Conference & JPA Meeting Location: San Diego, CA

- Date: TBD Two days during the week of January 22, 2024
- All Day Conference with evening Celebration
- ¹/₂ Day JPA Member Representatives Meeting
- Counties are encouraged to let your RMs know what topics you'd like to see on the Conference program

Adjourn joint meetings of the CalSAWS Member Representatives and JPA Board of Directors

