## CalSAWS | JPA Board of Directors Meeting



## Agenda

- Call Meeting to Order
- 2. Confirmation of Quorum and 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 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 Consent Items

- a. Approval of the Minutes and review of the Action Items from the January 26, 2024, joint meetings of the JPA Member Representatives and Board of Directors.
- b. Approval of Accenture Change Notice 31, which includes Premise items (CalWORKs Child Support Pass-through to Families and Housing Assistance Payments (HAP) Eviction (SB 1083)), County Purchases, WAN Updates, and administrative no-cost changes.
- c. Approval of ClearBest Work Orders 1-3:
  - Work Order 1, which includes Correspondence Scope.
  - ii. Work Order 2, which includes six Premise items CARES (FCED), CFAP Expansion, CalWORKs Child Support Pass-through to Families, Housing Assistance Payments (HAP) Eviction (SB 1083), Family Reunification AB 135, and CalFresh Notice of Denial or Pending Status.
  - Work Order 3, which includes additional Project Management Services.
- d. Approval of Deloitte ISS Contract Change Order No. 7, which includes County Purchases.
- e. Approval of RGS Contract Amendment No. 39, which includes updated salary schedule and other administrative updates.

## Informational Items

## Procurement Updates

- M&O Procurement
- BenefitsCal RFP

Notice of Intent to Award, Appeal & Negotiations Information

- NOIA and Vendor Selection Report Issued on February 8, 2024 and posted to CalSAWS.org.
- Selected Bidders:
  - Gainwell as the Infrastructure Contractor
  - Deloitte as the M&E Contractor
- Non-confidential versions of all Bidder Proposals also posted on February 8, 2024.
- Appeal Information
  - Deadline for filing an appeal: February 15, 2024
- Initial Contract Negotiations with both vendors scheduled on February 15, 2024.

## Vendor Selection Report

- Overview/Table of Contents
  - Executive Summary
  - Proposal Evaluation Methodology and Process
  - Infrastructure Results
  - M&E Results
  - Consolidated Scoring, Final Selection and Recommendation

## CalSAWS M&O Procurement Vendor Selection Report

- Proposals received from five Bidders:
  - 1. Peraton Infrastructure Only
  - 2. Deloitte Infrastructure & M&E
  - 3. Accenture Infrastructure & M&E
  - 4. Kyndryl Infrastructure Only
  - 5. Gainwell Infrastructure & M&E

## Vendor Selection Report

Infrastructure Scoring Summary

	Category/Subcategory	Subcategory Weight	Overall Weight	Total Possible Points	Accenture	Deloitte	Gainwell	Kyndryl	Peraton
	Business Proposal		70.0%						
1	Staff Qualifications and Experience	5%		5.0	4.24	4.41	3.93	2.62	3.75
2	Oral Presentations	5%		5.0	3.50	3.00	4.00	4.00	3.00
3	Key Staff Interviews	10%		10.0	8.50	8.00	7.25	6.38	6.38
4	Understanding and Approach	50%		50.0	38.85	41.88	42.40	31.35	36.88
	Business Proposal Raw Scores			70.0	55.09	57.29	57.58	44.35	50.00
	Business Proposal Normalized Scores			70.0	66.98	69.65	70.00	53.92	60.79
	Price Proposal		30.0%						
5	6-Year Base Contract Period (Excluding	30.0%		30.0	25.69	26.27	28.37	24.14	30.00
	Deliverables Paid During Transition-In)								
	Price Proposal Scores			30.0	25.69	26.27	28.37	24.14	30.00
	Business Proposal + Price Proposal Total		100.0%	100.0	92.67	95.92	98.37	78.06	90.79

## Vendor Selection Report

## M&E Scoring Summary

	Category/Subcategory	Subcategory Weight	Overall Weight	Total Possible Points	Accenture	Deloitte	Gainwell
	Business Proposal		70.0%				
1	Staff Qualifications and Experience	5%		5.0	4.68	4.38	4.33
2	Oral Presentations	5%		5.0	4.00	3.50	3.00
3	Key Staff Interviews	10%		10.0	8.42	8.25	6.92
4	Understanding and Approach	50%		50.0	36.75	41.75	33.58
	Business Proposal Raw Scores			70.0	53.85	57.88	47.83
	Business Proposal Normalized Scores			70.0	65.12	70.00	57.84
	Price Proposal		30.0%				
	6-Year Base Contract Period (Excluding Deliverables Paid During Transition-In)	25.0%		25.0	19.93	19.54	25.00
	SCR Price	5.0%		5.0	5.00	1.90	4.24
5	Price Proposal Scores	30.0%		30.0	24.93	21.44	29.24
	Business Proposal + Price Proposal Total		100.0%	100.0	90.05	91.44	87.08

## Vendor Selection Report

- Consolidated Scoring Summary
- Business Score Comparisons

Vendors	Infrastructure Business Score	M&E Business Score	Total Consolidated Business Score
Accenture	66.98	65.12	132.10
Deloitte	69.65	70.00	139.65
Gainwell	70.00	57.84	127.84
High Score Comparator	70.00	70.00	140.00

## Vendor Selection Report

Consolidated Scoring Summary Comparisons

Consolidated Proposals	Business Score: 70%	Price Score: 30%	Total Score: 200 Points	Rank
Accenture	132.10	56.47	188.57	3
Deloitte	139.65	49.50	189.15	2
Gainwell	127.84	59.24	187.08	4
High Score Comparator	140.00	50.87	190.87	1

## Next Steps

- 1 Finalize Agreements with Gainwell and Deloitte.
- 2 Submit Agreements for State review and approval on March 11, 2024.
- 3 Submit Agreements for Federal review and approval on April 19, 2024.
- 4 CalSAWS JPA BOD approval planned for June 28, 2024.
- 5 Contingency Month: July 2024.
- 6 Planned Contract Start Dates: 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 and Stakeholder Review of Requirements	June 6 – August 4, 2023
4	State Review of Requirements	November 20 – December 6, 2023
5	Consortium, Stakeholder, State and Federal Reviews and Approval of the RFP	January 17 – May 28, 2024
6	Release RFP	May 29, 2024
7	Proposals Due	July 30, 2024
8	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
9	Vendor Selection Report Preparation and Approvals	February 6 – March 18, 2025
10	Publish Notice of Intent to Award and VSR	March 19, 2025
11	Contract Negotiations	March 24 – April 3, 2025
12	State Contract Approval	April 4 – May 8, 2025
13	Federal Contract Approval	May 9 – July 14, 2025
14	Contingency Period	July 15 – August 18, 2025
15	JPA BOD Approval	August 22, 2025
16	Contract Start	September 2, 2025
17	Transition-In Period	September 2, 2025 – February 27, 2026

## **Next Steps**

- State Review and approval of BenefitsCal RFP: January 15
   March 18, 2024.
- 2 Federal review and approval: March 21 May 22, 2024.
- BenefitsCal RFP Release: May 29, 2024.



BenefitsCal User Account Security Incident

## CalSAWS Conference Debrief

## Cultivating CalSAWS Community





297 Registered

250 Attended

146 Representatives from

45 Different Counties

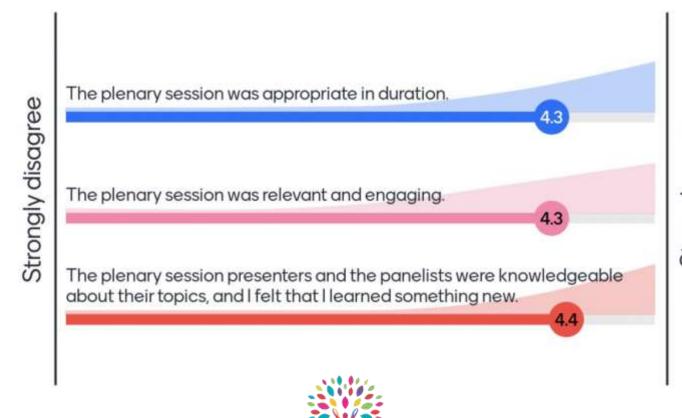
## Overall Experience

The conference duration (day and a half) provided the right amount of time to cover topics. The conference was well-organized. Strongly disagree The conference had the right balance of sessions and free time. There were the right number of plenary sessions. 4.7 There were the right number of breakout sessions. 4.5 Overall, the conference was a valuable experience.



# Strongly agree

## Plenary Session #1 - BenefitsCal: A Path to Transform County Service Delivery and Increase Public Self-Reliance



**Cultivating CalSAWS Community** 

# Plenary Session #2 - A Peek into the World of Artificial Intelligence (AI) in CalSAWS





## Plenary Session #3 - Using Automation to Bridge the Gap within Our Communities

Strongly disagree

The plenary session was appropriate in duration,

4.3

The plenary session was relevant and engaging.

4.2

The plenary session presenter was knowledgeable about their topics, and I felt that I learned something new.

4.3



## Breakout Session #1 - Operationalizing Reports for Effective Day-to-Day Use

The breakout session was appropriate in duration. Strongly disagree The breakout session was relevant, engaging, and appropriately interative. 4.2 The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new.



# Breakout Session #2 - Improving Efficiency Using Task Management and GetNext Functionality



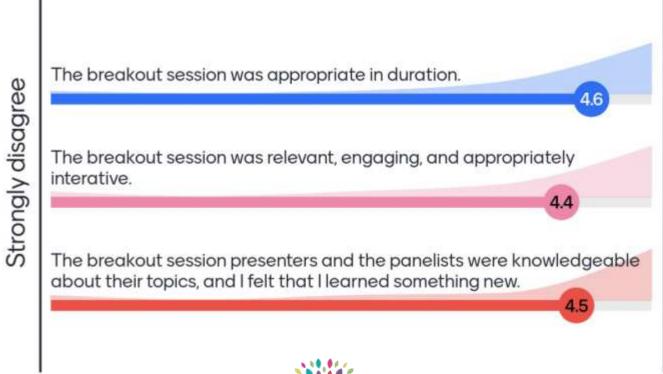


## Breakout Session #3 - Future of Training for Success

The breakout session was appropriate in duration. Strongly disagree The breakout session was relevant, engaging, and appropriately interative. 4.3 The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. 4.4



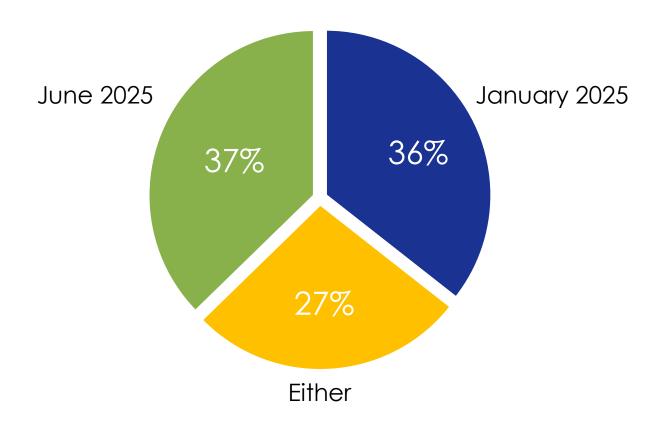
## Breakout Session #4 - Optimizing Your Contact Center







# For the next in-person conference, would you prefer it to occur in January 2025 or June 2025?



# Where would you like the next in-person meeting to be held?



## What was your favorite part of the conference?

"Networking and catching up with colleagues."

"Putting faces with names. The ability to network and engage my peers from other Counties. Also, the fact that we were given hope that our system can and will get better."

"Not information overload. We were able to take away valuable, key components of every topic."

"County sharing, hearing and learning some new things about multiple topics, seeing county and project staff in-person, and networking." "I really valued the county sharing."

"All the learning. And celebrating successes."

"Panel Discussions"

"Breakout Sessions"

"The last presentation that made the connection of our work to the people we serve. I liked the chance to remember the "why" of the work we do."

"I enjoyed learning about the system capability and best practices from various counties. I also liked the information about upcoming changes to system programming and AI."

"The CalSAWS migration video from the CalWIN counties."

"Renewal of the mission purpose."

"The Al Session."

"...And kudos to the Al presenter for demystifying Al. Surprisingly, that turned out to be my favorite session."

"The Regional Managers Trivia..."

"Interactive pieces. Networking with counties, vendors, and stakeholders."

"Loved the sessions. Loved the location. Super great energy. Great speakers."

"...Hearing about the things CalSAWS is doing moving forward."



**Cultivating CalSAWS Community** 

## How can we improve for next time?

"Offering breakout sessions (same one) at different times so that counties that don't have multiple representatives can attend all breakout sessions."

"More social events"

"Present from the counties perspective and impact to counties."

"More inclusion of Foster Care, KinGap, Child Welfare, and AAP."

"Have closed captions on all videos presented."

"Use a hotel that is not going through construction."

"Don't include dinner.
Have social time after last session. This approach allows 300 individuals to support small local restaurants/stores nearby to stimulate local economy."

"Sessions that are actually helpful for directors - big picture. The sessions were too in the weeds for department directors."

"The length of the conference was rather short-maybe include additional breakout sessions and maybe include a 2-3 breakout sessions by program (similar to CWDA) - additional networking time (2.5 days)."

"Better signage."

"Some actual hands-on demonstrations would be great - especially with the Contact Center, AI, and BOTS - to actually show what is being done and what is possible."

"Beer, wine and drink sales in conference area immediately after close of Day 1, similar to CWDA conference. It keeps people close by and talking." "Having a mobile app, if there was one I somehow missed it."

"Continue with the quality that has been displayed for years. Much thanks to the committee and all of their hard work is truly appreciated."



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Governor's Proposed Budget

## Governor's Proposed Budget

- Funding for CalSAWS and CalWIN aligns to previously approved Advance Planning Documents
- Most premise items aligned to expected amounts
- A few variances to premise items were identified that will require adjustments as part of the the May Revise, including a CARES shift from Current Year to Budget Year and additional enhancements identified for Get CalFresh Parity

## CalSAWS January 2024 As-Needed IAPDU Overview

- The CalSAWS Implementation Advance Planning Document Update (IAPDU) was submitted to the State for review on 1/31/24.
- The As-Needed process (vs. Annual) was utilized to address critical needs in Current Year and Budget Year.
- The changes result in an increase of approximately 6% to Budget Year and 21% for SFY 25/26 (net 4% for the budget term with prior year savings)
- State review 2/1/24 3/4/24; federal review 3/5/24 5/6/24.

#### **CHANGES**

- Technical Roadmap Zero-Trust, NIST, Security Upgrades, Database Optimization, Multi-Cloud Environment Assessment
- Hardware/Software Updates
- Central Print Updates Impression Counts, Additional Forms, Return Mail
- State Requests State Personnel, IV&V

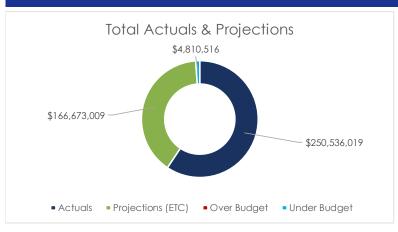
- WDTIP Scope Alignment Ongoing Support
- Workload Assignment Enhancement –
   Appointment Process, Worker Availability,
   Configuration Needs, AWS
- Customer Service Center Agent Counts, Software Licensing, AWS
- Administrative Adjustments

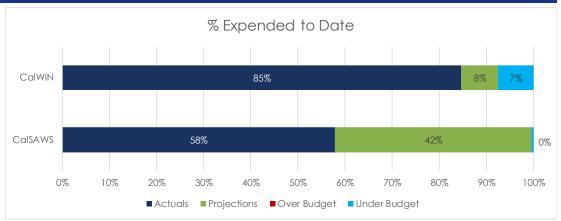
#### Overview

**Based on Vendor Invoices & County Claims** Projections (Estimates to Complete) CalSAWS DD&I/M&O **Estimated Costs for Future Months** Estimate at Completion (EAC) **Actual Costs Plus Estimated** Premise Total Allocation/Budget Amount Allocated by Line Item for the Approved **Budget** Balance CalWIN M&O Difference Between EAC and Budget Negative balance is over budget Positive balance is under budget % Expended to Date (Actuals) JPA Admin Percent of Actuals to Date Divided by the Budget % EAC to Budget Percent of EAC Divided by the Budget

Actuals to Date

#### Cal**SAWS** | SFY 2023/24 FINANCIAL DASHBOARD - February 12, 2024

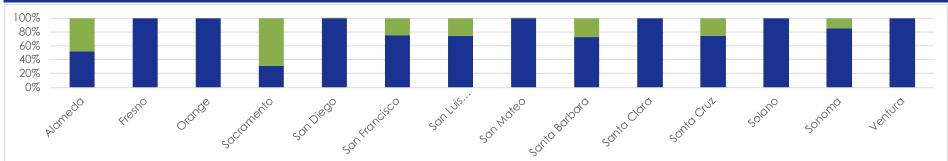




Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	\$201,132,136	\$144,967,126	\$346,099,262	\$347,459,194	\$1,359,932	57.9%	99.6%	
DD&I Non-App. Dev.	\$27,920,542	\$2,969,394	\$30,889,936	\$32,050,115	\$1,160,179	87.1%	96.4%	Facilities, ISS, Staff, and Travel less than planned
DD&I Training	\$2,303,154	\$0	\$2,303,154	\$2,652,320	\$349,166	86.8%	86.8%	Staff and Travel less than planned
CalSAWS M&O	\$165,066,568	\$138,213,030	\$303,279,598	\$303,130,185	(\$149,413)	54.5%	100.0%	Pending IAPDU/allocation approval
M&O Procurement	\$890,480	\$356,288	\$1,246,768	\$1,246,768	\$0	71.4%	100.0%	
OCAT M&O	\$1,526,485	\$672,934	\$2,199,419	\$2,199,419	\$0	69.4%	100.0%	
CalHEERS Interface	\$2,981,328	\$2,009,023	\$4,990,351	\$4,990,351	\$0	59.7%	100.0%	
Covered CA CSC	\$443,579	\$746,457	\$1,190,036	\$1,190,036	\$0	37.3%	100.0%	
CalSAWS Premise	\$13,752,345	\$18,112,227	\$31,864,572	\$32,197,095	\$332,523	42.7%	99.0%	
CalSAWS Premise	\$13,752,345	\$18,112,227	\$31,864,572	\$32,197,095	\$332,523	42.7%	99.0%	Budget aligned to May Revise
CalWIN M&O	\$35,337,104	\$3,256,523	\$38,593,627	\$41,711,688	\$3,118,061	84.7%	92.5%	
CalWIN M&O	\$31,992,676	\$3,256,523	\$35,249,199	\$37,788,796	\$2,539,597	84.7%	93.3%	
CalHEERS Interface	\$2,712,600	\$0	\$2,712,600	\$3,070,178	\$357,578	88.4%	88.4%	Costs less than planned
CalHEERS CSCN	\$631,828	\$0	\$631,828	\$852,714	\$220,886	74.1%	74.1%	
JPA Admin. Budget	\$314,434	\$337,133	\$651,567	\$651,567	\$0	48.3%	100.0%	
CalSAWS 58 Counties	\$314,434	\$337,133	\$651,567	\$651,567	\$0	48.3%	100.0%	
Total	\$250,536,019	\$166,673,009	\$417,209,028	\$422,019,544	\$4,810,516	59.4%	98.9%	

<sup>1.</sup> Actuals are based on planned invoices through March (partial) payment month

### Cal**SAWS** | SFY 2023/24 DD&I COUNTY SUPPORT STAFF



COMBINED TOTAL	<b>\$ 4.4 M</b> Actuals to Date	<b>\$ 1.8 M</b> Projections	\$ 6.2 M Estimate At Completion	<b>\$ 6.2 M</b> Total Allocation	\$ .0 M Balance (+Under/-Over)	<b>71%</b> % Expended to Date	100% % EAC to Budget
Alameda	\$475,421	\$442,540	\$917,961	\$917,961	\$0	52%	100%
Fresno	\$1,011,422	\$0	\$1,011,422	\$1,011,422	\$0	100%	100%
Orange	\$393,487	\$0	\$393,487	\$393,487	\$0	100%	100%
Sacramento	\$537,249	\$1,208,140	\$1,745,389	\$1,745,389	\$0	31%	100%
San Diego	\$1,002,011	\$94	\$1,002,105	\$1,002,105	\$0	100%	100%
San Francisco	\$209,641	\$69,559	\$279,200	\$279,200	\$0	75%	100%
San Luis Obispo	\$125,445	\$43,074	\$168,519	\$168,519	\$0	74%	100%
San Mateo	\$156,867	\$48	\$156,915	\$156,915	\$0	100%	100%
Santa Barbara	\$69,976	\$26,203	\$96,179	\$96,179	\$0	73%	100%
Santa Clara	\$61,248	\$0	\$61,248	\$61,248	\$0	100%	100%
Santa Cruz	\$73,773	\$24,996	\$98,769	\$98,769	\$0	75%	100%
Solano	\$85,608	\$0	\$85,608	\$85,608	\$0	100%	100%
Sonoma	\$93,794	\$15,743	\$109,537	\$109,537	\$0	86%	100%
Ventura	\$80,353	\$0	\$80,353	\$80,353	\$0	100%	100%

### Cal**SAWS** | SFY 2023/24 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS	\$19,041,279	\$11,962,667	\$31,003,946	\$31,127,757	\$123,811	61.2%	99.6%
Consortium Personnel - County <sup>1</sup>	\$6,503,751	\$6,248,862	\$12,752,613	\$12,847,754	\$95,141	50.6%	99.3%
Consortium Personnel - Contractor <sup>2,3</sup>	\$12,537,528	\$5,713,805	\$18,251,333	\$18,280,003	\$28,670	68.6%	99.8%
CalWIN M&O	\$1,590,118	\$171,970	\$1,762,088	\$1,872,074	\$109,986	84.9%	94.1%
Consortium Personnel - County <sup>1</sup>	\$53,579	\$15,616	\$69,195	\$69,195	\$0	77.4%	100.0%
Consortium Personnel - Contractor <sup>2,3</sup>	\$1,536,539	\$156,354	\$1,692,893	\$1,802,879	\$109,986	85.2%	93.9%
CalSAWS Premise	\$63,873	\$0	\$63,873	\$63,873	\$0	100.0%	100.0%
Consortium Personnel - County	\$63,873	\$0	\$63,873	\$63,873	\$0	100.0%	100.0%
Consortium Personnel - Contractor <sup>2</sup>	\$0	\$0	\$0	\$0	\$0	0.0%	0.0%
Total	\$20,695,270	\$12,134,637	\$32,829,907	\$33,063,704	\$233,797	62.6%	99.3%

SFY 2023/24 - Consortium Personnel FTE Counts	FTE
CalSAWS	153
Consortium Personnel - County <sup>1</sup>	58
Consortium Personnel - Contractor <sup>2</sup>	80
Consortium Personnel - Contractor Limited Term <sup>3</sup>	13
TBD⁴	2
Premise	2
Consortium Personnel - County <sup>1</sup>	2
Consortium Personnel - Contractor <sup>2</sup>	0
Total	155

 $<sup>^{\</sup>rm 1}$  Includes only Consortium Staff, does not include County Support Staff

<sup>&</sup>lt;sup>2</sup>Includes RGS, CSAC & CWDA employees

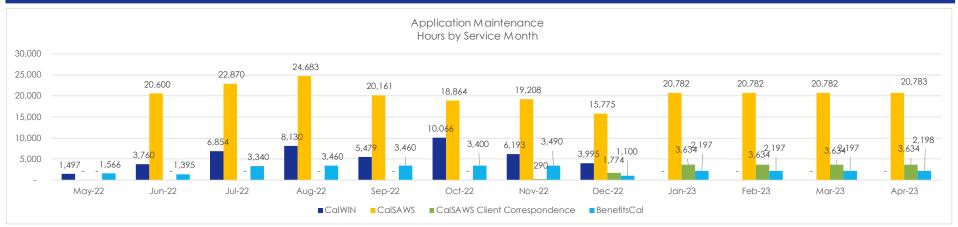
<sup>&</sup>lt;sup>3</sup>Includes RGS Contractors

<sup>&</sup>lt;sup>4</sup>Does not account for backfill considerations

### Cal**SAWS** | SFY 2023/24 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalWIN M&O	\$7,340,953	\$0	\$7,340,953	\$7,634,846	\$293,893	96.2%	96.2%
CalWIN M&O	\$6,834,030	\$0	\$6,834,030	\$6,838,212	\$4,182	99.9%	99.9%
CalHEERS Interface Change Budget	\$437,687	\$0	\$437,687	\$602,604	\$164,917	72.6%	72.6%
CalHEERS CSCN Change Budget	\$0	\$0	\$0	\$124,794	\$124,794	0.0%	0.0%
CalWN Premise	\$69,236	\$0	\$69,236	\$69,236	\$0	100.0%	100.0%
CalSAWS M&O	\$30,475,974	\$12,150,369	\$42,626,343	\$42,819,869	\$193,526	71.2%	99.5%
CalSAWS M&E	\$18,848,870	\$8,051,008	\$26,899,878	\$26,899,878	\$0	70.1%	100.0%
CalHEERS Interface Change Budget	\$1,748,858	\$1,417,186	\$3,166,044	\$3,166,044	\$0	55.2%	100.0%
BenefitsCal	\$2,977,538	\$724,903	\$3,702,441	\$3,702,441	\$0	80.4%	100.0%
CalSAWS Premise	\$6,900,708	\$1,957,272	\$8,857,980	\$9,051,506	\$193,526	76.2%	97.9%
TOTAL	\$37,816,927	\$12,150,369	\$49,967,296	\$50,454,715	\$487,419	75.0%	99.0%

#### Cal**SAWS** | SFY 2023/24 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM



Change Budget Category	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Total
CalWIN M&O	1,497	3,760	6,854	8,130	5,479	10,066	6,193	3,995	-	-	-	-	-	45,974
Design & Build	194	54	-	573	-	2,524	-	-	-	-	-	-	-	3,345
Test	517	899	86	287	287	2,524	-	406	-	-	-	-	-	5,006
Management & Other Support	786	2,807	6,768	7,270	5,192	5,018	6,193	3,589	-	-	-	-	-	37,623
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CalSAWS M&O	-	20,600	22,870	24,683	20,161	18,864	19,208	15,775	20,782	20,782	20,782	20,783	-	225,290
Design & Build	-	13,704	16,991	11,556	9,862	7,588	10,006	6,735	-	-	-	-	-	76,442
Test	-	3,829	3,332	5,280	4,551	4,654	3,208	3,458	-	-	-	-	-	28,312
Management & Other Support	-	3,067	2,547	7,847	5,748	6,622	5,994	5,582	-	-	-	-	-	37,407
Projection	-	-	-	-	-	-	-	-	20,782	20,782	20,782	20,783	-	83,129
CalSAWS Client Correspondence	-	-	-	-	-	-	290	1,774	3,634	3,634	3,634	3,634	-	16,600
Client Corresondence	-	-	-	-	-	-	290	1,774	-	-	-	-	-	2,064
Projection	-	-	-	-	-	-	-	-	3,634	3,634	3,634	3,634	-	14,536
BenefitsCal	1,566	1,395	3,340	3,460	3,460	3,400	3,490	1,100	2,197	2,197	2,197	2,198	-	30,000
Design & Build	861	770	1,837	1,903	1,903	1,870	1,919	605	-	-	-	-	-	11,668
Test	391	350	835	865	865	850	873	275	-	-	-	-	-	5,304
Management & Other Support	314	275	668	692	692	680	698	220	-	-	-	-	-	4,239
Projection	-	-	-	-	-	-	-	-	2,197	2,197	2,197	2,198	-	8,789
COMBINED TOTAL		25,755	33,064	36,273	29,100	32,330	28,891	20,870	22,979	22,979	22,979	22,981	-	301,264

#### **NOTES:**

May 2023 hours were partially paid in June 2023 and therefore reflected in SFY 22/23 report.

CalWIN has completed all activities. Final reconciliation is in process for hours/invoices.

CalSAWS includes approved shift from CalHEERS, offshore "no-cost" hours, and additional client correspondence hours.

### Cal**SAWS** | SFY 2023/24 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail								
Category	Contract	Service Month	Amount	Invoice Month	Invoice #			
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	April-23	\$5,000	September-23	1100942377			
SLA - Release Quality within User Acceptance Test	CalWIN	May-23	\$3,000	August-23	80011313			
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	\$10,000	September-23	1100942377			
Hyland - Delay in document processing	CalSAWS	June-22	\$79,564	October-23	1100948204			
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	\$10,000	September-23	1100942377			
Deficiency Service Ticket Resolution Performance	CalWIN	July-23	\$34,000	November-23	80013286			
CalSAWS System Daily Batch Production	CalSAWS	July-23	\$5,000	October-23	1100948269			
Prime EDBC Response Time	CalSAWS	August-23	\$2,000	December-23	1100969260			
CalSAWS System Daily Batch Production	CalSAWS	August-23	\$5,000	December-23	1100969260			
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	August-23	\$5,000	December-23	1100969260			
CalSAWS System Daily Batch Production	CalSAWS	October-23	\$5,000	December-23	1100969260			
CalSAWS System Daily Batch Production	CalSAWS	November-23	\$5,000	April-24	TBD			
CalSAWS Incident Notification Delay	CalSAWS	December-23	\$5,000	April-24	TBD			
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	December-23	\$5,000	April-24	TBD			
CalSAWS System Daily Batch Production	CalSAWS	December-23	\$5,000	April-24	TBD			
Hyland	CalSAWS	December-23	\$8,160	April-24	TBD			
Total			\$191,724					

Hours & Credits										
Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)					
CalWIN Modernization ("Modification") Hours	\$10,033,825	\$0	\$10,033,825	\$10,033,825	\$0					
CalWIN Business Intelligence (BI)	\$3,971,215	\$0	\$3,971,215	\$3,971,215	\$0					
CalWIN IDMS	\$1,500,000	\$0	\$1,500,000	\$1,500,000	\$0					
CalWIN Business Rules Engine (BRE)	\$3,500,000	\$0	\$3,500,000	\$3,500,000	\$0					
Total	\$19,005,040	\$0	\$19,005,039	\$19,005,040	\$0					

#### Notes:

Modernization Hours include hours for Contract Years 1-7 plus partial Contract Year 8.

Modernation Hours are leveraged for BenefitsCal Technical Help Desk.

IDMS \$1.5M applied to CalSAWS GA/GR.

BRE \$3.5M applied to CalSAWS GA/GR.

#### Cal**SAWS** | SFY 2023/24 CHANGE NOTICE TRACKING

CalSAWS Contract	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 30)	\$92,000,000	
Previously Approved through June 2022	\$41,748,853	FIVE - EIGHTEEN
Functional Support, Technical Help Desk, Premise,	\$5,519,866	NINETEEN - TWENTY ONE
Various Premise Items	\$2,219,022	TWENTY TWO
Various Premise Items	\$1,995,667	TWENTY THREE
Various Premise Items (Incl ARPA)	\$2,462,894	TWENTY FOUR
Various Enhancements and Premise Items	\$6,131,532	TWENTY FIVE
Various Premise Items	\$2,973,504	TWENTY SIX - TWENTY SEVEN
Various Premise Items	\$1,836,762	TWENTY EIGHT
Various Premise Items	\$1,541,846	TWENTY NINE
Various Premise Items	\$20,545,920	THIRTY
Various Premise Items and Reconciliation to Actuals	(\$6,593,923)	THIRTY ONE*
Total Allocated Amounts	\$80,381,943	
Total Remaining Allocation	\$11,618,057	
CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref

CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	\$20,000,000	
Approved County Purchases	\$1,702,883	FIFTEEN
Approved County Purchases	\$5,112,800	TWENTY
Approved County Purchases	\$552,126	TWENTY TWO
Approved County Purchases	\$6,672,844	TWENTY FIVE- TWENTY SEVEN
Approved County Purchases	\$581,873	TWENTY EIGHT
Approved County Purchases	\$245,232	TWENTY NINE
Approved County Purchases	\$80,147	THIRTY
Approved County Purchases	\$658,623	THIRTY-ONE*
Total Allocated Amounts	\$15,606,528	
Total Remaining Allocation	\$4 202 472	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 8)	\$8,829,000	
Various Premise Items	\$593,134	CO 8 ONE - THREE*
Total Allocated Amounts	\$593,134	
Total Remaining Allocation	\$8,235,866	
CallAllAl Cambrach (Brancis a / Anna Admint Cambraca)	Total Americal	Chamara Ouday Dat

Total Remaining Allocation	\$8,235,866	
CalWIN Contract (Premise/App Maint. Services)	Total Amount	Change Order Ref.
Total Baseline Allocation	\$6,010,749	
Projects 60584, 61307, 58079, and 61073	\$1,500,000	SEVEN
BenefitsCal Technical Help Desk Support	\$1,367,616	NINE
Total Allocated Amounts	\$2,867,616	
Total Remaining Allocation	\$3,143,133	

CalWIN Contract (County Purchases)	Total Amount	Change Order Ref.
Total Baseline Allocation	\$3,900,000	
Previously Approved	\$2,021,592	N/A
Projects 60548 and 60549	\$177,419	FOUR
Projects 60858, 60859, 61078 and 61377	\$262,105	FIVE
Projects 62909, 63220, 62955, and 62287	\$158,426	SIX
Projects 61624, 60975, 61785, 61472, 62259, 62910	\$121,752	SIX
Projects 62197, 63468, 63,600, and 63655	\$42,034	SEVEN
Project 64149	\$9,160	EIGHT
Project 64340, 63833, 64394	\$202,073	NINE
Total Allocated Amounts	\$2,994,561	
Total Remaining Allocation	\$905,439	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 5)	\$13,000,000	
Various Premise Items	\$1,112,377	ONE - THREE
American Recovery Plan Act (ARPA)	\$2,226,023	FOUR-FIVE, SEVEN
Get CalFresh (Code for America) - Security Monitoring	\$50,001	SIX
CW Time Clocks	\$71,000	EIGHT
ARPA - Release of Information (ROI)	\$2,074,391	NINE
ARPA - SAR7/7A UCD Phase 3	\$216,910	TEN
Additional Enhancements	\$92,890	ELEVEN
ARPA - Communication and Marketing Campaign (Phase 2	\$1,472,000	TWELVE
ARPA - CalFresh App "Joint Processing" by SSA	\$530,664	THIRTEEN
BenefitsCal CalFresh Parity Work	\$1,949,536	FOURTEEN
Total Allocated Amounts	\$9,795,792	
Total Remaining Allocation	\$3,204,208	

Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
Total Baseline Allocation (Amendment 2)	\$8,000,000	
San Francisco	\$615,250	ONE*
Santa Clara	\$183,236	TWO*
San Diego	\$256,116	THREE*
San Mateo	\$199,483	FOUR*
San Mateo	\$297,166	FOUR - REV 1*
San Francisco	\$148,537	FIVE*
San Francisco	\$177,839	SIX*
Total Allocated Amounts	\$1,877,627	
Total Remaining Allocation	\$6,122,373	

<sup>\*</sup>Pending Board Approval

# CalSAWS Executive Director Recruitment Update

# CalSAWS Executive Director Recruitment Update

- In partnership with Regional Government Services (RGS), CalSAWS issued a recruitment to backfill the Executive Director position on January 29th.
- The position is posted to governmentjobs.com and to CalSAWS.org/Careers. It has also been distributed by CWDA and promoted on Linked In.
- Recruitment will remain open until February 29th.
- Executive Director Recruitment Advisory Group of three to five JPA Board Members will review resumes and conduct interviews of qualified candidates during the month of March.
- Advisory Group will provide selection recommendation to Board Members during the April Board meeting.

## Final Acceptance

- Central Print
- ISS
- CalSAWS

# Final Acceptance Introduction

CalSAWS Core System, Central Print, and Implementation Support

- The following milestones were completed in the past:
  - OCAT Final Acceptance November 2021
  - BenefitsCal Final Acceptance February 2022
  - C-IV/CalACES (40 County) Migration Final Acceptance May 2022
- These milestones are targeted for completion in 2024:
  - CalSAWS Migration Final Acceptance Accenture March
  - Central Print Final Acceptance Gainwell February
  - CalWIN Implementation Support Services (ISS) -Implementation Complete Report – Deloitte - February
- Approval of these milestones leads to the Consortium's payment of the final holdback release for the CalSAWS DD&I Project

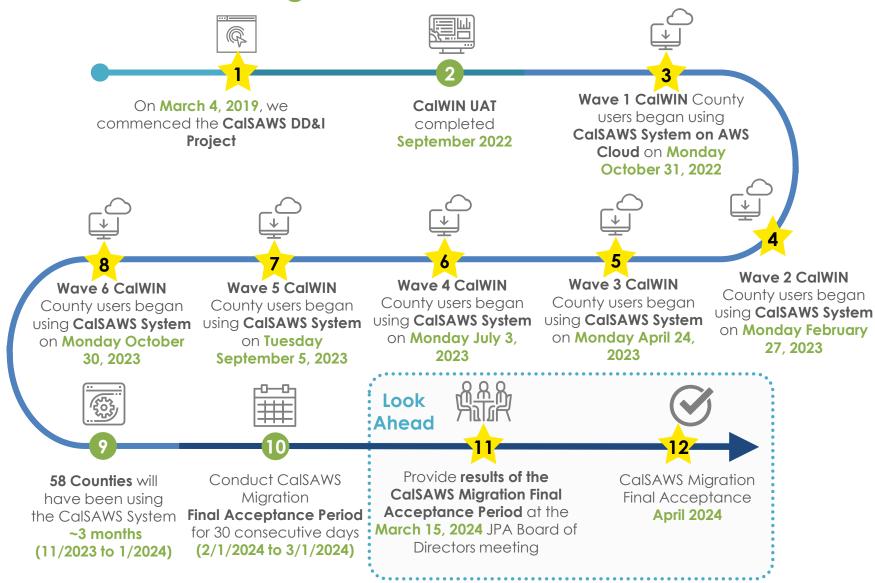
# CalSAWS Migration Final Acceptance

# CalSAWS Migration Final Acceptance Preview Purpose

- The purpose of the CalSAWS Migration Final Acceptance is to confirm that:
  - Requirements related to the CalWIN Counties' migration to CalSAWS have been met
  - The CalSAWS System is meeting performance requirements
  - The CalSAWS Application contains zero non-cosmetic defects related to the CalWIN Counties' migration
- The Final Acceptance process is based on a two-step approach:
  - Feb 2024 For JPA, Discuss process and scope for CalSAWS Migration Final Acceptance.
  - March 2024 Review the results and observations of the 30 consecutive day Final Acceptance period, and whether CalSAWS Migration Final Acceptance has been met or if Consortium Director's discretion is required
- Approval of the CalSAWS Migration Final Acceptance leads to the Consortium's payment of the final holdback release for the CalSAWS DD&I Project

# CalSAWS Migration Final Acceptance Preview

CalWIN Counties' Migration Timeline Overview



# CalSAWS Migration Final Acceptance Preview

On October 31, 2023, the last CalWIN counties were migrated to CalSAWS. The CalSAWS System currently supports 58 counties, over 85,000 users, serves over 21.5M residents, and is one of the largest integrated eligibility systems in the world

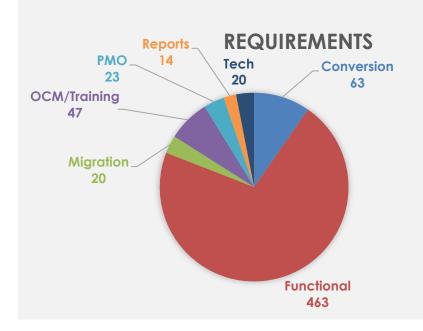
**650 total requirements** for the CalSAWS migration were met via:

**96** Contract Deliverables

978 SCRs deployed

**982,000** 

Approximate hours worked



# CalSAWS Migration Final Acceptance Preview



### CalSAWS Final Acceptance Deliverable includes:

- Results of the 30 consecutive day Final Acceptance Period will include:
  - Results for Performance Requirements
  - Outstanding open non-cosmetic defects (for DD&I CalWIN Migration SCRs deployed via releases 21.09 to 24.01)
  - Summary of key lessons learned and recommendations for improvements to the CalSAWS Software
- Updated Requirements Traceability Matrix (RTM), reporting status of the CalWIN Counties' migration requirements from the CalSAWS DD&I Statement of Requirements

### Example of Performance Requirements to be reviewed

Perf Req #	Performance Requirement Title	February 2024 SLA Met/Not Me	
1	Monthly Off Prime Business Hours Availability	Met	<b>♡</b>
2	Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	Met	<b>♡</b>
3	Monthly Deficiency Notification Response Time	Met	<b>♡</b>
4	Monthly Helpdesk Diagnosis Time	Met	<b>9</b>
5	Daily Peak Usage Hours Availability	Met	<b>♡</b>
6	Daily Prime Business Hours Availability	Met	<b>♡</b>
7	Daily Peak Usage Hours ED/BC Response Time	Met	<b>♡</b>
8	Daily Prime Business Hours ED/BC Response Time	Met	<b>♡</b>
9	Daily Peak Usage Hours Screen to Screen to lo Response Time	Met	<b>♡</b>
10	Daily Prime Business Hours Scre Daily Prime Business Hours Scre	Met	<b>♡</b>
11	Daily Batch Production Jobs Column	Met	<b>♡</b>
12	Daily Off Prime Business Hours ED/BC Response Time	Met	<b>♡</b>
13	Daily Off Prime Business Hours Screen to Screen Navigation Response Time	Met	<b>♡</b>
14	Daily Unbounded Search Response Time	Met	<b>♡</b>
15	Daily Prime Business Hours Availability of CalSAWS Training Environments	Met	<b>②</b>
16	Daily Peak Usage Hours Standard Report Response Time	Met	<b>♡</b>
17	Security Incident Notification	Met	<b>♡</b>
18	Security Incident Reporting	Met	<b>♡</b>
19	Security Incident Negligence	Met	<b>⊘</b>
20	Disaster Recovery Response Time	Met	$ \bigcirc $

# Performance Results Next Steps for March 2024 Meeting



# Next Steps for CalSAWS Migration Final Acceptance:

- Report on results of performance requirements for the CalSAWS System for the 30 consecutive day final acceptance period
- Confirm DD&I Requirements are met
- Address open defects. As of February 8, there are 6 open defects related to CalWIN Migration SCRs deployed via between 21.09 and 23.11, these are targeted for a priority release this month



# On-going Maintenance and Operations Activities:

- Address Reporting defects and continue to support counties with questions
- Contact Center
  - Continue regular support meetings with each county to address resolution of tickets and/or defects.
  - Execute action plan for rolling eCCP out to the remaining C-IV counties.
  - On-going maintenance on the Welcome and Authentication BOTs
- Resolve open defects with GA/GR functionality
- Focus on ForgeRock operational and architectural improvements

# Central Print Final Acceptance

# Central Print Final Acceptance

### Phased Implementation

- Implementation of Central Print was completed in three phases:
  - Phase 1 Los Angeles County
  - Phase 2 Former C-IV Counties
  - Phase 3 Former CalWIN Counties corresponding to the six waves
- The Final Acceptance Report has been under development since Phase 1 completion
  - Phase 1 and Phase 2 draft versions were provided following 30 days of operation for each phase
  - > Final deliverable including all three Phases was submitted on 12/21



# Central Print Final Acceptance



### Central Print Final Acceptance Report Deliverable

The Final Acceptance Report documents the achievement of full operational capabilities, including:

- Completed operational readiness checklists for each phase
- Summary of all implementation phases with metrics verifying successful completion of all implementation tasks
- Certification that all requirements have been met and all known Deficiencies have been corrected
- Summary of lessons learned and best practices
- Recommendations for any improvements to the Print Services
- Updates to the Print Services M&O Plan, and other documents if required

# CalWIN ISS Completion Report

### **CalWIN ISS Completion Report**

#### **PURPOSE**

- Contract Acknowledge Deloitte performed in accordance with the contract terms.
- **Deliverables** Deliverables were delivered in a satisfactory manner, material and cosmetic deficiencies addressed, and obtained Consortium approval.
- Conclusion Signify the conclusion of the Deloitte CalWIN Implementation Support Services (ISS) effort.



### CalWIN ISS Completion Report – Key Measures

As of 02/06/2024

#### **KEY PROJECT MEASURES**

95 of 95

**RTM Requirements Met** 

100%

**Deliverables Approved** 

None

**Contract Deficiencies** 

**Open Workplan Tasks** 

None

Open Workplan Tasks to Transfer

None

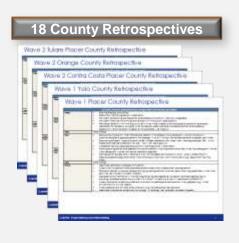
**Open Action Items** 

None

Open Risks/Issues

None

#### **IMPLEMENTATION COMPLETION AND RETROSPECTIVES**



#### **Lessons Learned**

- PROJECT
  MANAGEMENT OFFICE
  (PMO)
- BUSINESS PROCESS REENGINEERING
- ORGANIZATIONAL CHANGE MANAGEMENT
- TRAINING
- IMPLEMENTATION AND CONVERSION SUPPORT

#### **Lessons Applied to Future Waves**



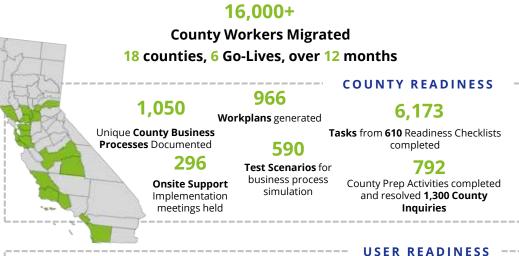


### CalWIN ISS Completion Report – By the Numbers

The Deloitte Implementation Support Team (~115 People) supported 18 California Counties with migration to CalSAWS, a statewide Eligibility and Enrollment (E&E) system. This included extensive pre-implementation planning, artifacts, and activities that were replicated in each wave and tailored to each County's operating model.

#### SURVEY RESULTS





776 **Readiness Surveys Change Network** Distributed and Analyzed Champions Staff Preparedness

859 Practice Lab sessions WBT Based and Topic Specific Webinars held Learning Journey Maps

Role-Based Gamification

County-Specific **Change Discussion Guides** 

**Staff** trained through

3,180 Instructor Led

**Trainings** 

**305 Davs** 

of Post Implementation Support across 6 Implementation Waves: Onsite and Virtual Support

Virtual Support 14.000+ First-Time Resolution Virtual Interactions Recorded Rate

**Onsite Support** Managed Onsite Support Staff

Managed project, vendor and County Post Implementation Support Staff

36

Post Implementation Support Orientations

Post Go Live **Meetings** with County + Project Executives conducted

610+



### QA Vendor Responsibilities







Contract Compliance



Independent Test



Testing and Support Services



UAT Support Services



Recommendations for Acceptance



Risk/Issue Management



Change Order Analysis



Deliverable Assessments, Requirements Traceability

	Met Status			
System	Total Requirements	Met	Met In Plan	Not Met
CalSAWS	650	648	2	0
Central Print	149	149	0	0
CalWIN ISS	95	95	0	0
Total	894	892	2	0

### CalSAWS Core System, Central Print, and Implementation Support



- QA recommendation for CalSAWS Migration Final Acceptance :
  - ✓ Summary of correction of each Deficiency identified during DD&I period
  - Summary of Lessons Learned and Recommendations for any Improvements
  - ✓ Update to Requirements Traceability Matrix (RTM)
  - Verification the CalSAWS Software has performed for 30 consecutive days without any Deficiencies, other than inconsequential Deficiencies that do not affect any Performance Standard, requirement, or Specification
  - Final Assessment of Del #96 CalSAWS Migration Final Acceptance Certification
- QA recommendation for CalWIN ISS Implementation Complete Report :
  - All deliverables met
  - All deficiencies identified have been corrected
  - Implementation Certification Reports is approved

### CalSAWS Core System, Central Print, and Implementation Support



- QA recommendation for Central Print Final Acceptance:
  - Completed operational readiness checklists for each phase;
  - Summary of all implementation phases with metrics verifying successful completion of all implementation tasks;
  - Certification that all requirements have been met and all known Deficiencies have been corrected;
  - Summary of lessons learned and best practices;
  - Recommendations for any improvements to the Print Services;
  - Updates to the Print Services M&O Plan, and other documents as required by the Consortium.
- QA will continue to participate in continuous improvement activities in support of the CalSAWS application:
  - Release Management, Functional Enhancements
  - Technical Maintenance and Upgrade Planning
  - Performance/SLA and Service Desk Reviews

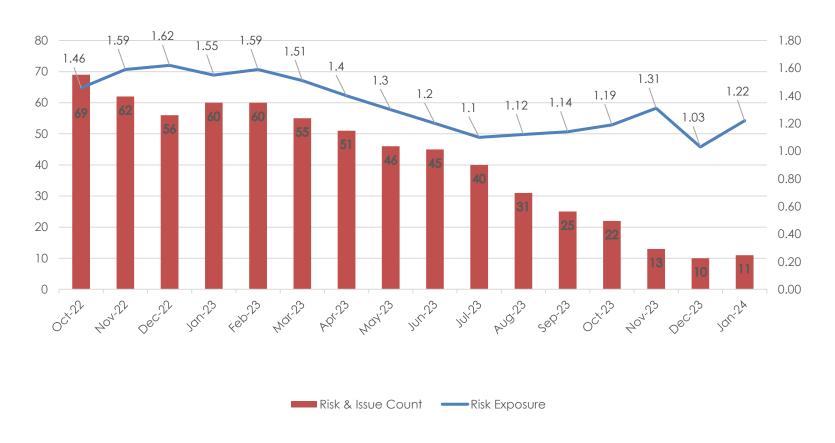
M&E Risks



# CalSAWS Project Risks

### Risk Exposure Trend

#### Risk/Issue Trend



# M&O Risk Summary

### CalSAWS Project Management Risks

Risk	Risk Name	Level
102	Lack of annual project funding may cause schedule delay or reduction in scope	
102	for CalSAWS & other projects	Medium
203	Project communications must continuously evolve, otherwise stakeholder /	
203	audience needs will not be met	Medium

### M&O Production Risks

Risk	Risk Name	Level
201	Pace of policy changes may exceed capacity of the project teams, resulting in less automation	Low
239	Lack of consistent State language translation approach may cause schedule delays and rework	Low
246	Perceived gap in functionality with GetCalFresh may impact adoption of BenefitsCal	Low
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Medium
296	Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely	Medium
297	Counties may face challenges in adopting management and ad hoc reports if additional support is not provided	Medium
298	Identify Continuous Improvement process to prevent poor WelcomeBot and AuthenticationBot Customer Experience	Low
299	Operationalizing Innovation Scaling/POC Initiatives	Low
300	Stability of the CalSAWS Enterprise Identity and Access Management Services	Medium

Updated as of 1/31/2024 Bi-Weekly Status Meeting

### Reports Status

 Conference Feedback – LA County Reports

# Expanding LA County Reports Background

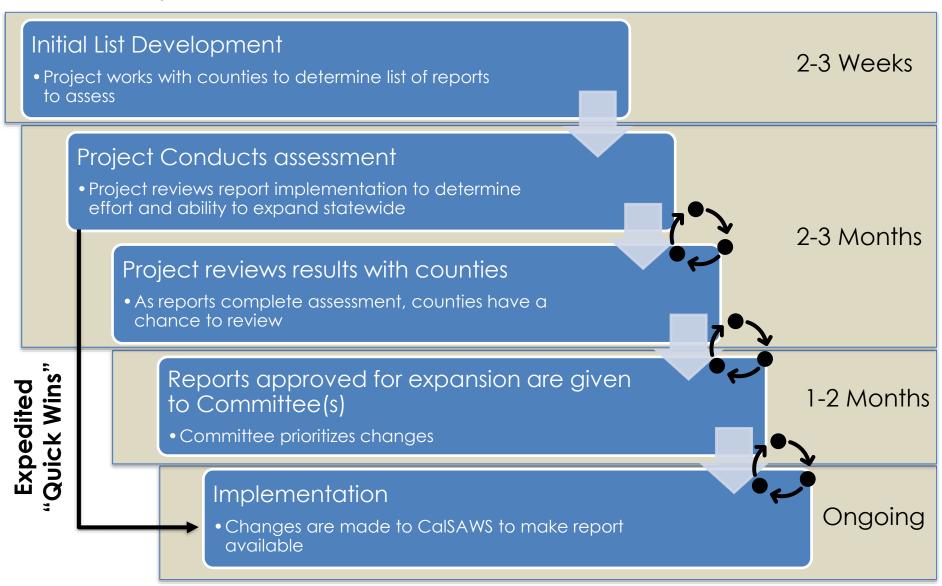
- A subset of reports (<100) from the LRS development were included in CalSAWS and are specifically designed for and only accessible to Los Angeles County.
- These reports were not assessed for statewide expansion as part of migration.
- Requests have been made to make these reports available to all counties

# Expanding LA County Reports Next Steps

- Project will work with the counties to develop a list of reports to be assessed for statewide expansion.
- With the list, the project will assess each report for:
  - Complexity and effort to extend to other counties
  - Impact to Los Angeles County (if any)
  - Frequency of use by Los Angeles County
  - If expanding the report will provide value to other counties
- Each report must be assessed on an individual basis to:
  - Determine if there is a unique technology utilized
    - GIS shape files provided by the county
  - Dependence on county specific interfaces, batch jobs, codes values, or application pages
    - eCAPs, CWS/CMS Data Mart, APP pages, etc.
- Any "quick wins" will be prioritized through the appropriate committee.

# **Expanding LA County Reports**

Next Steps



### Release and Policy Update/Communications

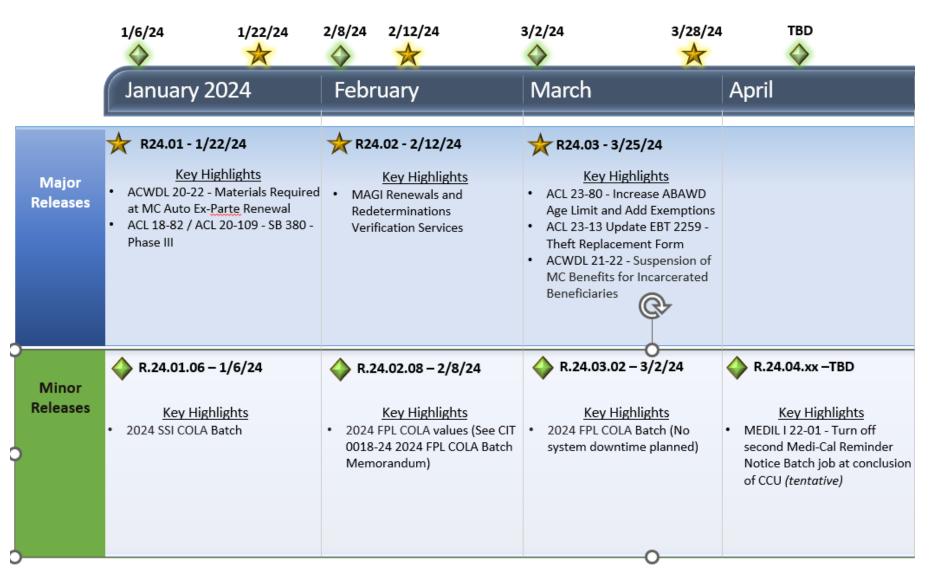
- Continuous Coverage Unwinding Status
- CalSAWS Release Highlights
- Workload Assignment
- Case Removal Update
- CERs and Timing



## CalSAWS Release and Policy Update Continuous Coverage Unwinding – DHCS Updates

- CMS has approved expanding the continuous coverage unwinding waivers and flexibilities through December 31, 2024.
  - The extension applies to unwinding renewals and to postunwinding renewals.
- Recently Posted Unwinding Data
  - DHCS has posted the <u>December 2023</u> Monthly Unwinding Report
    - The data submission includes an increased ex parte success rate due to the automation of several income waivers and a reduced procedural termination rate.
  - On December 29, 2023, DHCS submitted to the Centers for Medicare and Medicaid Services a mandated update to the federal unwinding data for June-August 2023.
    - The updated data is accessible on the Medi-Cal Enrollment and Renewal Data webpage, specifically the updated data is labeled as "90-Day Update" under each respective month.

### Release Overview



## Text Messaging Update

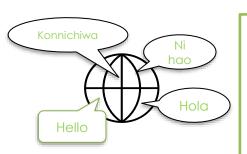
### Campaign Name Change

- Change text message campaign name to "CalSAWS" to "BenefitsCal"
- Changes have been approved by the Committee
- Changes were submitted to advocates. Currently reviewing advocate feedback
- Targeting change for 24.07
- One-time informational text blast to notify beneficiaries (approx. 6M) before the switch is made
- Confirming budget and timing
- Add announcement to BenefitsCal and latest text message inventory to BenefitsCal online help



### **Texting in Other Languages**

- Text messages are currently sent in English and Spanish
- Existing text messages to be translated and sent out for review (late Spring)
- Target for deployment next SFY



## CalFresh Mass Replacement Update

- CDSS is preparing to submit a waiver request to FNS to provide automated mass replacements of a certain percentage of February 2024 regular CalFresh allotments for ongoing CalFresh households in areas in which 50% of the residents lost power for four hours or more due to the recent winter storms, power outages, and Public Safety Power Shut-Off (PSPS) events across California.
- As of February 9, the request covered 26 counties (highlighted in purple) and over 120 zip codes

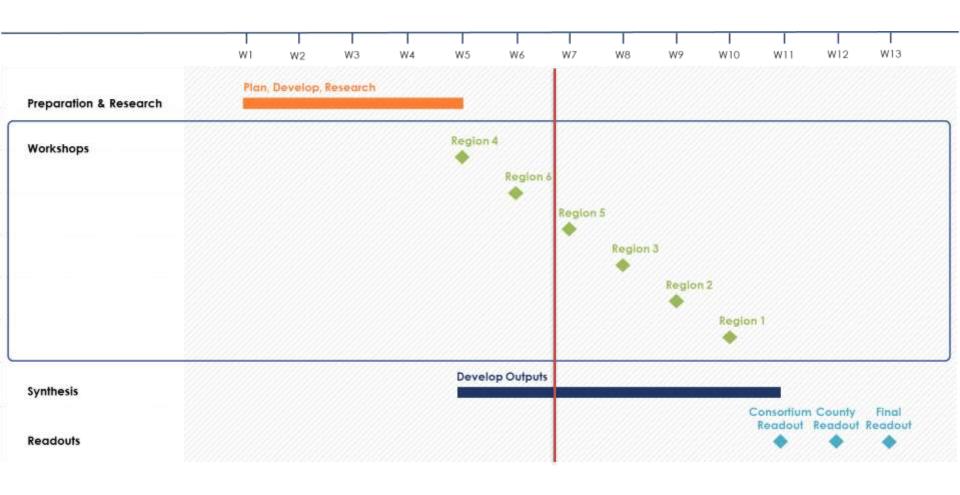
BUTTE	SACRAMENTO
CONTRA COSTA	SAN JOAQUIN
EL DORADO	SAN LUIS OBISPO
FRESNO	SAN MATEO
HUMBOLDT	SANTA CLARA
KERN	SANTA CRUZ
LAKE	SHASTA
MARIN	SOLANO
MENDOCINO	SONOMA
MERCED	SUTTER
MONTEREY	TUOLUMNE
NAPA	YOLO
PLACER	YUBA

## Workload Assignment

The assignment of workers during intake is critical to the timely processing of applications. Many counties are leveraging tools outside of the system.

- Initiated from CERs from San Bernardino, Monterey, Santa Clara, and Kern
- Requirements will address automation around intake worker assignment, usability of worker schedule, and related Reporting
- Outcome is to provide a list of requirements and roadmap to address county needs that will be prioritized

## Workload Assignment



Workload Assignment

## **Common Themes**



## **Process Feedback**

- 2 Workshops conducted for Regions 4 and 6
- 46 participants across 12 counties
- 100% Positive Feedback on approach

... tool was very useful for this type of interactive feedback gathering. The facilitators were organized and it felt like everyone was heard. I appreciated the moderators knowledge and guidance throughout the whole workshop as most of us sort went in different directions. I liked the interactive whiteboard...

It was interactive. It's nice to get different perspectives from other sections about their workflow and challenges they are facing.

Some staff are introverted and would oftentimes like to provide input, but feel too anxious about speaking up to voice their concerns in front of others. The board allowed them to provide valuable input in a manner that did not make them feel anxious.

### Case Removal

## Background

- In 2021, CalSAWS Project Steering Committee (PSC) approved the <u>CalSAWS Data Retention Policy</u> to remove specific aged data from the C-IV system prior to migration into CalSAWS. The CDRP provides guidelines for how long to retain case data in CalSAWS once a case has been closed. The series of batch programs that implements this policy was last run in CalSAWS in 2022. See CIT 0088-22 for reference.
- The CalSAWS Data Retention Policy is scheduled to occur on an annual basis, once a year.

### Case Removal

## **Upcoming Case Removal**

 The next run will occur for LA County + the former C-IV Counties

Case Removal Events	Total Program Count
CalSAWS System: LA + former C-IV Counties October 8, 2022 - First CalSAWS Case Purge	1,657,220
CalSAWS System: LA + former C-IV Counties Cases identified for removal on January 5, 2024	1,070,159

### Case Removal

2024 Case Removal Timeline



## Policy Update CERs and Timing

- For 2023
  - 471 CERs received
  - 320 SCRs created
- Working to improve the timeline for resolving CERs by creating SCR or rejecting CER more quickly. Also, focus effort to group relevant CER/SCRs to address several issues at a time
- Working to lighten the time intensive RCM responsibilities
  - Utilizing successful smaller workgroups for design/approval
  - Looking at CER process refinements
  - Maintain transparency and communication

## CalSAWS Data Archiving Initiative

### CalSAWS Data Archive – Phase 1

### **Background and Goal**

### Move 3+ years-old data to a new database

### **Background:**

- The current monolithic Oracle database holds all the 58-county data and continues to experience data growth every day.
- The greater the database size; the higher the storage cost.

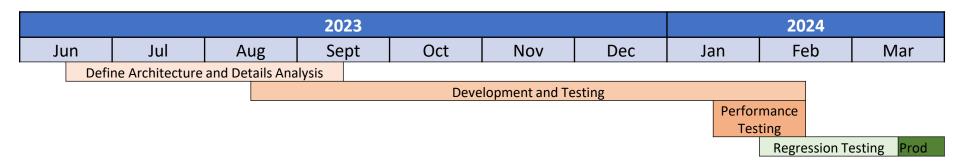
### Goal:

- Reduce the Oracle database size by moving 3 years and older data to a secondary database for EDBC, Fiscal, Client correspondence functional group
- Minimum end-user impact, display information about archived cases and provide an option to unarchive data to the primary database.
- Reduce impact to the Ad-hoc database for reports.

## CalSAWS Data Growth Archive - Phase 1

### Release Timeline

SCR CA-263291 <R24.03>



## CalSAWS Data Growth Archive – Phase 1

## **Archive Process**

#### Data identification Process:

• Identify three and more year's older case data from the tables used by EDBC, Fiscal, Client correspondence functionality from the CalSAWS Production Oracle database.

#### Archive Process:

- Move the identified case data from the primary Oracle database to secondary database and delete from the primary database on successful move.
- Map the case as a case with archived data.
- Display online pages for the corresponding case as Case with Archived data.

#### Unarchive Process:

- Provide option for the worker to unarchive the case data.
- Notify the worker in the message center on successful unarchive action.
- The unarchive is an asynchronous, near real time process.
- In no change to the data, the unarchived records will be archived again during next archive frequency.

#### Initial One Time Archive:

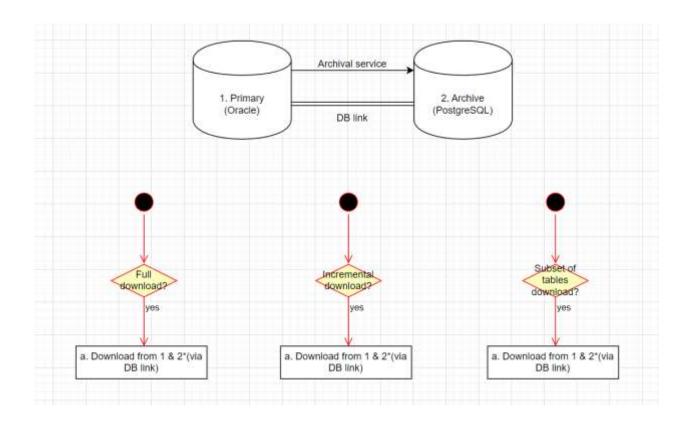
- After the production deployment of the code, there will be communication with plan of approach and timeline.
- This will be a phase approach by considering the volume of data to be archived.

### Regular Archive

• After the one time archive, the archive process will run on a regular frequency decided by the consortium (example: monthly).

## Data Growth Archival Phase I – Adhoc Reporting Ad-hoc Reporting Data Flow

- Current Process: The Adhoc reporting process will pull necessary load from the primary oracle database.
- After Archive implementation: The database link will be available to pull data from primary and the secondary database.



- ROI Update
- BenefitsCal Release Highlights
- BenefitsCal Client Education Initiative for Text messages
- Path and Scope for threshold languages
- Optical Character Recognition for BenefitsCal Documents Uploaded by Customers

## BenefitsCal Update Release of Information (ROI) Workgroup

- Most recent working session held on 02/05/24
- Provided a demonstration of the ROI functionality in BenefitsCal and CalSAWS (based on the original design that was paused in May 2023)
- Working with the Stakeholders on applicant/recipient
  roles/responsibilities (e.g., Authorized Representatives, Power of Attorney,
  CBOs, etc.) matrix, which addresses Medi-Cal, CalFresh and CalWORKs
  programs completed, will be included in future Errata or state letter by
  both DHCS and CDSS.
- Additional chart for responsibilities in progress to cover scenarios when contracts in place or not. This chart is to be included in future letter.
- Next meeting dates scheduled:
  - 3/4/2024
  - 3/18/2024
  - 4/8/2024

## Release Highlights & Upcoming Enhancements

January (24.01.25) February (24.02.29) March (24.03.28) **Collaboration Model GCF Parity Enhancements: GCF Parity Enhancements**  Removal of Vaccine status Digitize form CF303 and make Research: pages for CalFresh only it available to complete if a Add a link for customers to applications user in a County with a view the Keep Your Records Add recommended words section of the MC Renewal declared disaster is already to Self-Employment help text getting CalFresh benefits. Form after submission Implement HTML ISO Revamp Customer language code for all the Dashboard web pages on website to improve Search Engine **Optimization** Collaboration Mode & **Prod Observation Policy Enhancements** 

## Enhancements

- Not display the future RE/PR due date in BCAL if the program is denied or discontinued.
- Update Dropdown list for document upload to display RE/SAR 7 categories on the top during Review Period
- Additional Conditions added to display RE/SAR7 forms in 'Document Type' dropdown during Doc Upload Flow

- Add link to CalHOPE on BC Homepage
- Add EBT 2259A (11/21 version) in English and Spanish as downloadable form in **BenefitsCal**

### **Policy Enhancements**

- ACL 23-13-Update to EBT 2259-Revised EBT Theft Replacement Form and Policy
- Allow customers to view CalWORKs time clocks information in their account and make request time limit extenders/stoppers or corrections

### Items on the Horizon

### Releases and Research

- Enhance the dropdown list for document upload to help simplify Periodic Reporting and Renewal Documents
- Update Application and RE/SAR7 Tracker to provide additional information to customer
- Research to add Card Replacement Tracker to Customers
- Research to add more features for Customer Dashboard
- Provide more information to customers when linking their case

### Upcoming

#### **Policy Items**

- ABAWD
- Apply for Benefits CAPI
- CFAP Expansion
- Benefits Replacement (EBT2259 form) -March 2023

#### Planning In-Progress

- Implement new pre-populated SAR7
- · Homeless Assistance
- Collaboration Model Prioritized Enhancements

#### **GCF Parity**

- SSA Assisted Applications May 2024
- Benefits Replacement (CF303) form -March 2024

During the month of January 2024:

764 Applications Submitted

Periodic Reports
Submitted

Million Documents
Uploaded

73 Changes
Reported

97 Renewals Submitted

Since Go-live over 3.8 Million Applications submitted

## BenefitsCal/CalSAWS

## Action Item Updates

- BenefitsCal Client Education Initiative for Text messages
- 2. Path and Scope for threshold languages in CalSAWS
- 3. Optical Character Recognition for BenefitsCal Documents Uploaded by Customers

## Optical Character Recognition (OCR)

## **Customer Uploads**

CalSAWS Imaging Solution currently uses OCR to help identify documents scanned by CalSAWS staff using the

following datapoints:

Form Numbers

DPA 19 (12/10)

Barcode Values

0000000397885255



## Optical Character Recognition (OCR) Customer Uploads

Benefits of introducing optical character recognition to BenefitsCal customer uploads:

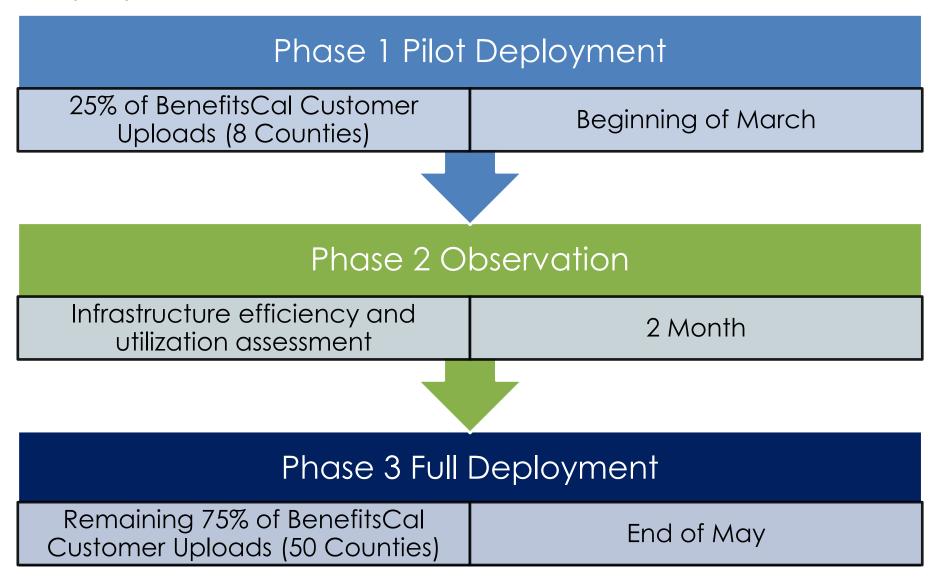
BenefitsCal
Submissions
make up ~30% of
all document
submissions to
CalSAWS

Document/Task classification accuracy or specificity improvement in up to 50% of customer uploads

Reduced image re-indexing workload due to inaccurate customer upload selections

## Optical Character Recognition (OCR)

## Deployment Timeline



## Optical Character Recognition (OCR) Outreach

### Prior to Phase 1 and 2

- February and May CITs
  - Detailed description of enhancement
  - Go-live date
  - Participating Counties
- Socialized in December, January, and March Imaging Committee Meetings
- Direct outreach to County imaging point of contacts and Regional Managers

Advocate Community – Structure and Goals

## CalSAWS Advocates Group

History, Structure and Goals





2018-19

70+

2024 and beyond

CA Food Banks Leadership **Partner Agencies** 

Equitable Language Access

Released Priorities Statement Collective Impact Model

Client support via CBO Functionality

Successful Support of BenefitsCal

Transparent alignment with WIC 10823.1-3

## Contact Center Update

## **Overall Contact Center Statistics**

# Over 1M calls handled in January 2024

800K calls handled in December 2023

 CalSAWS Contact Center counties are now live and operational in the CalSAWS Amazon Connect solution

## **Contact Center Operations**

### Continuous Improvement

- Improve Agent and Customer Experience
- Improve Customer Service to Counties
- Improve Support for County IT



## Aligning our Support Strategy with our Regions Focus on Customer Service



## Welcome Bot Dashboard

Dashboard data from Monday, 2/5 to Monday, 2/12



Live Bots to-date: 7

### **Welcome Bot Update**

- Released over 400 new utterances
- Upcoming Releases: Clearer prompts, additional time for callers to give data
- Benefits: Allows customer to specify a reason for their call and to be routed accordingly
- Self-Service: Approximately 36% of callers can successfully resolve their inquiries without the need to speak with a county worker. Allowing county workers to focus on addressing more urgent and important calls, better serving the community.

**English** 

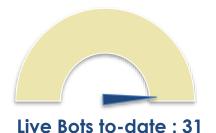
95k+ Calls this Week

Spanish

20k+ Calls this Week

## **Authentication Bot Dashboard**

Dashboard data from Monday, 2/5 to Monday, 2/12



### **Authentication Bot Update**

- 31 Contact Center counties are now live
- Released over 200 new utterances to the Authentication Bot
- Upcoming Releases: Clearer prompts, additional time for callers to give data
- Benefits:
  - Allows customers to use different sets of data to authenticate. (ie: SSN,
  - Reduces average handle time (AHT)
  - Saves time for Worker

**English** 

280k+ Calls this Week

Spanish

60k+ Calls this Week

### RPA Dashboard

Dashboard data from Sunday, 2/5 to Sunday, 2/12

### **Robotic Process Automation Update**

- Deployed RPA to 5 counties
- All remaining counties are scheduled to deploy by May 2024.
  - Scheduling county kick-off sessions with each county as deployments approach.
- Benefits:
  - Automates reissuance of EBT card, thereby reducing the number of requests handled by a county worker.

### **Key Performance Metrics**

Since 11/17 Launch...

96.17% Success

18289 Total EBT Requests

17588 Requests

### RPA EBT Card Replacement County Schedule for Sprint 1-9

County Rollout Plan	Kickoff Date	County Testing	Deployment Date	Status
Prod Sprint 1 [Yolo]	12/7/23	1/12	1/18	Complete
LA BIC UiPath Cloud Migration to CalSAWS AWS Cloud		1/22 – 1/24	1/24	Complete
LA EBT UiPath Cloud Migration to CalSAWS AWS Cloud	N/A	1/22 – 1/24	2/1	Complete
Prod Sprint 2 [Tulare, Ventura, Santa Barbara]	1/16-1/18	1/29 – 2/1	2/8	Complete
Prod Sprint 3 [Santa Cruz, San Mateo, San Diego, Stanislaus, Kings, Butte]	1/22 - 1/26	2/12 – 2/15	2/22	In Progress San Mateo 2/29 (Go Live) (Tentative)
Prod Sprint 4 [Kern, Santa Clara, Yuba, Monterey, Riverside]	2/19 – 2/22	2/26 – 3/1	3/14	In Progress
Prod Sprint 5 [San Francisco, Fresno, Sonoma, Alameda]	3/4 – 3/8	3/18 – 3/21	4/11	Not Started
Sprint 6 [Sacramento, Humboldt, San Luis Obispo]	4/1 – 4/4	4/22 – 4/25	5/9	Not Started
Prod Sprint 7 [Non-CSC -14 Counties]	TBD	TBD	TBD	N/A (Kickoff and County Testing is not required)
Sprint 8/9 Counties with Welcome Bot: Placer, Shasta, Contra Costa, Orange, San Bernardino, Solano, Sutter, Marin	TBD	TBD	TBD	Not Started

### Quarterly Statistics Update

- SLAs, Production Stability, Tickets, and Defects
- Hyland Imaging SLAs
- BenefitsCal Performance Metrics

### January 2024 Production Highlights

St	unday	Μ	londay	Τι	jesday	We	dnesday	Th	nursday		Friday	Sc	aturday
30		1		2		3		4		5		6	Control Control
7		8		9		10		11		12		13	
14	The state of the s	15		16		17	Land Control of Contro	18		19	Control Control	20	The state of the s
21		22		23		24		25		26		27	
										Users acce	m-10:26am unable to ss systems o ForgeRock ess		
29		29		30	00 <b>0</b>	31		1		2		3	

## CalSAWS System Stability

CalSAWS Slowness 2/26

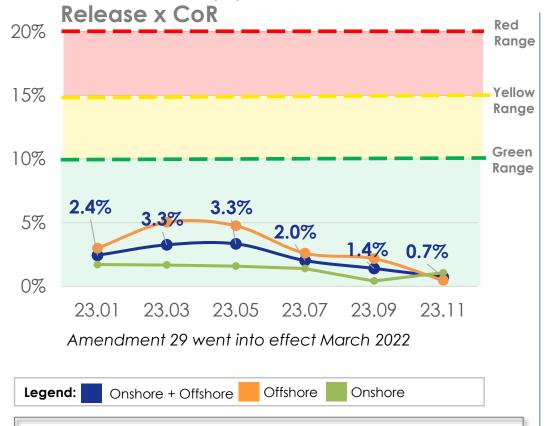
### Impact:

- 8:50 AM -> 10:26 AM (~90 Minutes)
  - CalSAWS users experienced slowness during this incident
  - BenefitsCal was placed in Maintenance mode

#### Resolution:

 Improvements in system tuning and traffic management were made to the system

### CalSAWS Application Release Quality Metrics



#### **TYPICAL RANGES**

**GREEN**: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.

AMBER/RED: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date (Actual Rework effort Hours/ Actuals To Date Hours)\*100

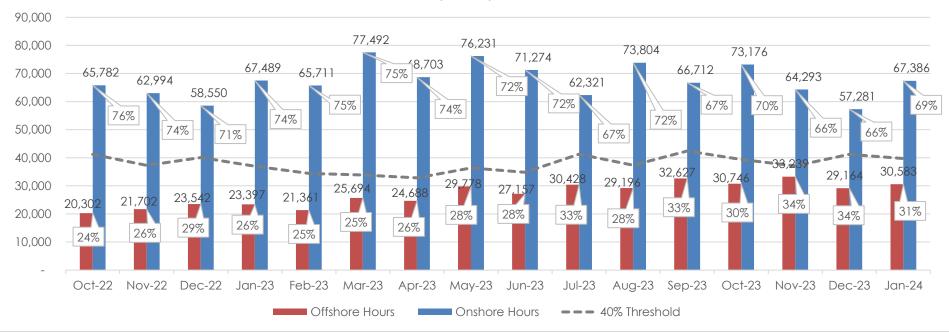
The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team

The CoR line graph may increase for the releases if additional defects are found in the future

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 24.01 COR numbers will be available after 24.03 goes live

#### GDN Workload Balance

#### Onshore vs. Offshore (GDN) Hours Across All Teams

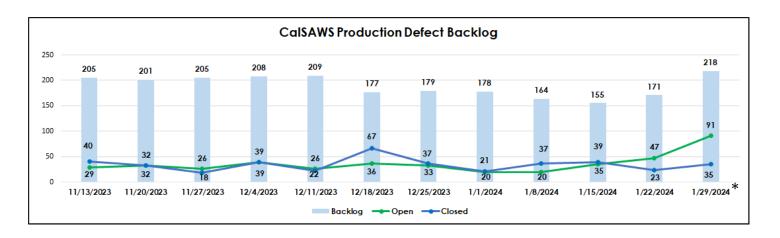


Per Amendment 29: "Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension"

# CalSAWS Quality, Defect, Stability, Tickets Stats Production Defects Backlog

Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges

The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production



<sup>\*</sup> Increase due to single BOTs defect being created for each county to align with deployment schedule

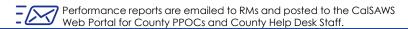
### **Production SLA Metrics**

Perf Req#	LD Applies	Performance Requirement Title	May	June	July	Aug	Sept	Oct	Nov*	Dec *	Jan *
1		Monthly Off Prime Business Hours Availability	<b>②</b>	<b>②</b>	<b>②</b>	<b>②</b>	<b>O</b>	<b>②</b>	0	<b>O</b>	<b>②</b>
2		Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	<b>②</b>	<b>②</b>	<b>②</b>	•	<b>②</b>	<b>②</b>	<b>O</b>	<b>②</b>	<b>②</b>
3		Monthly Deficiency Notification Response Time							<b>②</b>		
4		Monthly Helpdesk Diagnosis Time		×					<b>O</b>		
5	•	Daily Peak Usage Hours Availability		×	<b>O</b>				<b>O</b>		×
6	•	Daily Prime Business Hours Availability	<b>O</b>	×	<b>O</b>	×	<b>O</b>	<b>O</b>	0	×	×
7	<b>O</b>	Daily Peak Usage Hours ED/BC Response Time	<b>②</b>	<b>O</b>	<b>O</b>	×	<b>O</b>	<b>②</b>	0	<b>Ø</b>	
8	•	Daily Prime Business Hours ED/BC Response Time	<b>O</b>		<b>O</b>				<b>②</b>	<b>O</b>	<b>O</b>
9	•	Daily Peak Usage Hours Screen to Screen Navigation Response Time	<b>②</b>	<b>②</b>	•	•	<b>②</b>	<b>②</b>	<b>O</b>	<b>②</b>	<b>②</b>
10	•	Daily Prime Business Hours Screen to Screen Navigation Response Time	<b>©</b>	<b>②</b>	<b>②</b>	•	<b>②</b>	<b>©</b>	<b>②</b>	<b>O</b>	<b>②</b>
11		Daily Batch Production Jobs Completion			×	×		×	8	×	×
12		Daily Off Prime Business Hours ED/BC Response Time			<b>⊘</b>				0		
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	•	<b>②</b>	<b>②</b>	•	•	<b>②</b>	•	<b>②</b>	<b>②</b>
14		Daily Unbounded Search Response Time							<b>O</b>		
15		Daily Prime Business Hours Availability of CalSAWS Training Environments	•	8	<b>②</b>	<b>②</b>	•	<b>②</b>	<b>©</b>	8	8
16		Daily Peak Usage Hours Standard Report Response Time							<b>②</b>		
17	<b>O</b>	Security Incident Notification							<b>②</b>		
18	<b>②</b>	Security Incident Reporting				<b>O</b>				<b>O</b>	
19	<b>O</b>	Security Incident Negligence			<b>O</b>	<b>O</b>	<b>V</b>	<b>O</b>	<b>②</b>	<b>O</b>	
20		Disaster Recovery Response Time	<b>O</b>		<b>O</b>			<b>O</b>	0		

- Daily Peak Business Hours Availability had 1 day with a missed SLA for Jan-2024
- Daily Prime Business Hours Availability had 1 day with a missed SLA for Dec-2023 and Jan-2024
- Daily Batch Production Jobs Completion had 2 days with missed SLAs for Nov-2023 and Dec-2023, and 1 day missed SLAs for Jan-2024
- Daily Prime Business Hours Availability of CalSAWS Training Environments had 1 day with a missed SLA for Dec-2023 and Jan-2024

<sup>\*</sup> November, December, and January SLA Metrics are still being formally reviewed





# CalSAWS Quality, Defect, Stability, Tickets Stats Roll Back of CA-245819

An enhancement to automatically open the next available document within a County workflow queue (CA-245819) was deployed as part of the 24.01 baseline release.

The Regional Project Managers provided feedback that Counties were experiencing unanticipated business process impacts to the imaging quality assurance queue as part of this enhancement, resulting in a roll back request.

On 1/24/24, CA-27319 rolled back this enhancement which resorted prior functionality.

The design of CA-245819 will be brought back to the Imaging Committee for further review and evaluated for a future release date.

### Hyland Imaging Performance Metrics

## **Monthly Uptime**

**Target: 99.90%** 

Month	Downtime Minutes	Monthly Percentage				
November 2023	0	100%				
December 2023	0	100%				
January 2024	0	100%				

Hyland

Hyland Imaging Performance Metrics

# Monthly Page Views Target: 90%

Datacenter will provide viewing access to a 70 KB page in <= 2 seconds

Month	Renditions 70K or smaller	Monthly Percentage
November 2023	14,694,870	98.28%
December 2023	14,657,023	97.77%
January 2024	16,400,837	98.82%

Hyland

Hyland Imaging Performance Metrics

# Monthly Database Transactions Target: 90%

Database transaction will be complete in <= 1 second

Month	Total Queries	Monthly Percentage
November 2023	2,968,655,677	99.95%
December 2023	2,672,473,059	99.93%
January 2024	3,062,229,372	99.94%

Hyland

## Adjourn Meeting

