



# CalSAWS CalWIN Implementation Support Services (ISS) Work Order

CalSAWS – CalWIN Implementation Support Services (ISS) Project  
Work Order

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**CalSAWS – CalWIN Implementation Support Services (ISS) Project**  
Work Order

## 1.0 Work Order Submission & Approval Form

<b>County Work Order Number</b>	05
<b>County Work Order Title</b>	San Francisco County – Additional Implementation Support
<b>Submitted Date</b>	10/12/2023
<b>Originator</b>	City and County of San Francisco
<b>Priority</b>	<p>Select the estimated priority level of the requested County Work Order:</p> <p><input type="checkbox"/> Critical – is necessary to avoid potential project stoppage.</p> <p><input checked="" type="checkbox"/> High – is necessary to avoid potential significant impact to the goals and objectives of the project.</p> <p><input type="checkbox"/> Medium – is necessary to avoid potential impact to the operational efficiency of project execution.</p> <p><input type="checkbox"/> Low – needs to be addressed, but the estimated impact to the project is minimal.</p>
<b>Detailed Description</b>	<p>San Francisco County ("County"), as a member of the California Statewide Automated Welfare System ("CalSAWS") Consortium, a party to Amendment No. Two of the CalWIN Implementation Services Agreement by and between CalSAWS Consortium and Deloitte Consulting, LLP, dated as of September 10, 2023, the terms of which are incorporated by reference and attached to this County Purchase Order ("County Purchase"), has requested implementation support services from Deloitte Consulting LLP associated with the CalSAWS project. This request requires charges for Deloitte Consulting LLP to provide such support to the County, which are further described in this County Purchase order.</p>

## CalSAWS – CalWIN Implementation Support Services (ISS) Project

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Assist San Francisco County Department of Human Services Agency with implementation support related to the CalSAWS system in the following areas:

1. Implementation – Support implementation and post-implementation activities including the following:
  - Support Go-Live, including troubleshooting of issues
  - Provide support of fiscal processes including issuance interfaces
  - Support the Go-Live Escalation/Command center framework
  - Organize activities around clean-up of yellow banner and discrepant cases before the anticipated COLA run in December 2023
2. System Stabilization
  - Provide guidance to pivot quickly on operational and/or tactical decisions previously made based on emerging issues, lessons learned and gained experience in the system
  - Analyze previous configuration decisions made based on knowledge and insights gained in production and adjust accordingly
3. Future State Strategic Initiatives
  - Revisit deferred decisions including centralized imaging
  - Review additional features in CalSAWS and BenefitsCal that were placed in the “parking lot” for future discussion, and develop implementation approach as appropriate
  - Work with Economic Support and Self-Sufficiency (ESSS) leadership on how CalSAWS can be leveraged in support of strategic initiatives, including
    - Determination of a model and execution approach of supporting more automated options as part of day-to-day operations
    - Finalization of governance model
4. Training
 

CalSAWS Instructor-led Training (ILTs) – provide additional in-person ILT courses post-Go Live for San Francisco County staff unable to complete the training courses during the original schedule. The ILT courses delivered will depend on the trainees’ work role and may include:

  - CalFresh Eligibility
  - CalFresh/CalWORKs Multi-Program
  - CalFresh/CalWORKs/Medi-Cal Multi-Program
  - CalFresh/Medi-Cal Multi-Program
  - CalWORKs Eligibility
  - CAPI
  - Child Care
  - Clerical
  - Employment Services WTW
  - Fiscal
  - Foster Care
  - GA/GR

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	<ul style="list-style-type: none"> <li>• General Eligibility</li> <li>• Hearings</li> <li>• Imaging</li> <li>• Medi-Cal Eligibility</li> <li>• QA/QC</li> <li>• RCA</li> <li>• Resource Databank Maintainer</li> <li>• Special Investigations</li> <li>• Supervisor Clerical</li> <li>• Supervisor Eligibility</li> </ul> <p>CalSAWS ILT courses rely on the completion of prerequisite Web-based Training (WBTs). As staff return, the County will submit a ServiceNow LMS Access Request ticket to the CalSAWS Project to provision their access to the CalSAWS LMS. Once provisioned, the returning staff will self-enroll in the prerequisite WBTs.</p> <p>ILT classes will occur each month as necessitated by the frequency of staff returning from leave and other staffing needs. The County Training POC and Deloitte will meet on a regular basis to review anticipated training needs. The County Training POC will provide timely notice to Deloitte of staffing needs.</p> <p>Assumptions:</p> <ul style="list-style-type: none"> <li>• Assistance to the County will be delivered in a hybrid environment, both in person and virtual as agreed upon by the County. The parties have agreed that the BPR resources will support the project primarily virtually with one onsite visit of 4 business days at a City and County of San Francisco office</li> <li>• County leadership and staff will be able to allocate resources to support discovery sessions, review and provide feedback on materials produced</li> <li>• Implementation of the operating model will be done by the County</li> <li>• For ILT Training delivery, the parties will work together to agree upon and schedule training sessions in advance. The parties have agreed that the Training resource deliver ILT training at a City and County of San Francisco office with up to three (3) trips to cover 12 days total. Days per business trip may vary but will be agreed upon by the parties in advance.</li> <li>• Training Resource will be available to start after execution of this Work Order (anticipated Nov 2023) based upon the County's needs through January 31, 2024. All other Resources will start upon the completion/utilization of the hours in the current SF County Work Order 1 (expected to be in October/November 2023), through January 31, 2024.</li> </ul>
<b>Review Date</b>	10/12/23
<b>Type of County Work Order</b>	<input type="checkbox"/> Fixed Fee <input checked="" type="checkbox"/> Time & Material

## CalSAWS – CalWIN Implementation Support Services (ISS) Project

### Work Order

## 2.0 Work Order Impact Analysis

The changes required to support this Work Order are described below.

<b>Design Impact</b>	N/A
<b>Development</b>	N/A
<b>Testing</b>	N/A
<b>Training</b>	Providing additional support to the County for ILT training delivery focused on training return-from-leave staff as well as staff who have not attended training.
<b>Communications</b>	N/A
<b>Performance</b>	N/A
<b>Software/Licenses</b>	N/A
<b>Deliverables (New and Updated)</b>	N/A
<b>Schedule</b>	N/A
<b>Implementation Support Impact</b>	Extension of CalSAWS CalWIN SF County Work Order 1 resources, who will provide additional support to the County as they migrate from CalWIN to CalSAWS. The services provided by the resources will extend to January 31, 2024 and help move the County toward a point of stabilization. The work will include post-implementation management and support that will assist the County to adjust to the transition from CalWIN to CalSAWS, and better serve customers and clients. The work will also promote a hybrid workforce to optimize the benefits of CalSAWS and BenefitsCal. Nadia Ahmed's labor category is adjusted to "Implementation Manager" to reflect the shift in the nature of the work she will perform, providing post-implementation support management to the County.

## 2.1 Work Order Hours

The estimated hours required to support this Work Order by resource type and brief description are:

Type	Description	Rate	Hours	Amount
BPR	Implementation Manager	\$220.47	320	\$70,550.40
BPR	Business Analyst	\$161.98	320	\$51,833.60

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Type	Description	Rate	Hours	Amount
Trainer	Trainer	\$174.35	150	\$26,152.50

## 2.2 Payment Schedule (If Applicable)

This Work Order is fully funded by the unallocated funds for additional Services provided under the Agreement added in Amendment No. Two in the amount of Eight Million Dollars (\$8,000,000).

Payment Point	Description	Submission Date	Cost
Monthly	Monthly report summarizing activities completed for the month associated with the areas of support and total hours expended	Monthly	Variable based on hours
Total Charges (not to Exceed):			\$148,536.50

## 2.3 Consortium Responsibilities

There are no activities that will be supported by the Consortium for this Work Order.

Work	Work Description
N/A	N/A

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### 3.0 County Work Order Approval

This County Work Order is accepted as allowing Deloitte Consulting LLP to proceed.

CERTIFICATION BY COUNTY:

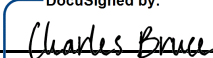
By submitting this County Work Order, County certifies that its request for goods or services pursuant to this County Work Order is consistent with County's procurement requirements and procedures and that County is seeking goods and services to be utilized primarily in connection with the Project rather than goods or services to be utilized primarily in connection with non-Project related County operations.

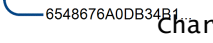
*Approved as to form and legality:*

**County Counsel**

10/26/2023

Dated: \_\_\_\_\_

By:  \_\_\_\_\_

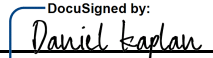
Name:  Charles Bruce

Title: Deputy City Attorney

**County Director**

10/26/2023

Dated: \_\_\_\_\_

By:  \_\_\_\_\_

 County Director



4.0 Work Order Approval

Approved	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Consortium Executive Director Signature		
Consortium Executive Director Name	John Boule	
Date		

IN WITNESS WHEREOF, the Consortium has caused this Work Order to be subscribed on behalf of the Consortium and Contractor has caused this Work Order to be subscribed on its behalf by its duly authorized officer, as indicated below.

DELOITTE CONSULTING LLP

Dated: 01-Nov-2023 | 9:08:59 PM IST

By: Rachel Frey

Name: Rachel Frey

Title: Principal

CALSAWS CONSORTIUM

Dated: 01-Nov-2023 | 8:44:46 AM PDT

By: Holly Murphy

John Boule, Consortium Executive Director



California Health and Human Services Agency  
Office of Technology & Solutions Integration  
Statewide Automated Welfare System (SAWS) Project  
2495 Natomas Park Drive, Suite 515  
Sacramento, California 95833  
(916) 263-3900



October 30, 2023

Kevin Li  
San Francisco County Department of Human Services  
1650 Mission St, 2<sup>nd</sup> Floor  
San Francisco, CA 94103

**Re: Deloitte Consulting Services for CalSAWS Migration Work Order #2 FY 2023-24-Part II**

Dear Mr. Li:

This approves your Fiscal Year (FY) 2023-24 request received October 26, 2023 to purchase IT Professional Services for the San Francisco County Human Services Agency. I understand that this purchase will be competitively procured in accordance with State and Federal guidelines.

Estimated one-time maintenance and operations costs in the amount of **\$148,537.00** are approved.

This approval is contingent upon the availability of state and federal funds. For claiming purposes, *this approval is for maintenance and operation costs only. **These costs are not eligible to be claimed as developmental costs.** Account number **38-23-11820** has been assigned as a project identification number for your claiming within the County Expense Claim Reporting Information System (CECRIS), internal tracking and audit purposes. Please now utilize this project number when claiming M&O Costs in CECRIS. If you have questions regarding the claiming of costs, please e-mail them to [fiscal.systems@dss.ca.gov](mailto:fiscal.systems@dss.ca.gov)*

If you have other questions or concerns, please contact Sudakshina Biswas (916) 263-0478 or email her at [Sudakshina.Biswas@osi.ca.gov](mailto:Sudakshina.Biswas@osi.ca.gov)

Sincerely,

DocuSigned by:  
A stylized signature of Daniel Brown in blue ink.

DANIEL BROWN  
SAWS Project

cc: Analyst, County Expense Claim, CDSS  
Analyst, Fiscal Policy Bureau, CDSS



**Certificate Of Completion**

Envelope Id: E6B546F8FEAB41CF8E7A2A8F12B3B5CE

Status: Completed

Subject: San Francisco County Signed Work Order 5 CalWIN ISS Business Support Services

Use Case: Deliverable Acceptance Document

Data Classification: Confidential

WBS (N/A if not available): CAL00578.00

Source Envelope:

Document Pages: 10

Signatures: 2

Envelope Originator:

Certificate Pages: 5

Initials: 0

Nik Knight

AutoNav: Enabled

Two Jericho Plaza 3rd Floor

Envelopeld Stamping: Enabled

ATTN: Accounts Payable

Time Zone: (UTC-08:00) Pacific Time (US &amp; Canada)

Jericho, NY 11753

IP Address: 24.206.77.40

**Record Tracking**

Status: Original

Holder: Nik Knight

Location: DocuSign

11/1/2023 8:21:42 AM

**Signer Events****Signature****Timestamp**

Rachel Frey



Sent: 11/1/2023 8:24:10 AM

Viewed: 11/1/2023 8:38:31 AM

Signed: 11/1/2023 8:38:59 AM

Principal

Deloitte US Account

Security Level: Email, Account Authentication  
(None)

Signature Adoption: Uploaded Signature Image

Using IP Address: 172.9.164.55

Signed using mobile

**Electronic Record and Signature Disclosure:**

Not Offered via DocuSign

Holly Murphy



Sent: 11/1/2023 8:39:00 AM

Viewed: 11/1/2023 8:44:21 AM

Signed: 11/1/2023 8:44:46 AM

CalSAWS PMO Director

Security Level: Email, Account Authentication  
(None)

Signature Adoption: Pre-selected Style

Using IP Address: 207.231.83.50

**Electronic Record and Signature Disclosure:**

Accepted: 11/1/2023 8:44:57 AM

ID: e0ee2ffe-2d4c-48bb-84d9-d29b896e8f68

Company Name: Deloitte

**In Person Signer Events****Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp****Certified Delivery Events****Status****Timestamp****Carbon Copy Events****Status****Timestamp**

Carbon Copy Events	Status	Timestamp
Duncan Gilliam	COPIED	Sent: 11/1/2023 8:44:47 AM
CalWIN ISS - Project Manager		
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Accepted: 5/19/2023 8:43:05 AM ID: 7fc8b135-adb7-49d8-8723-07e20891360c Company Name: Deloitte		
Jeric Haung	COPIED	Sent: 11/1/2023 8:44:47 AM
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Matt Wasno	COPIED	Sent: 11/1/2023 8:44:47 AM
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Susanne Nielson	COPIED	Sent: 11/1/2023 8:44:47 AM Viewed: 11/1/2023 8:45:32 AM
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	11/1/2023 8:24:10 AM
Certified Delivered	Security Checked	11/1/2023 8:44:21 AM
Signing Complete	Security Checked	11/1/2023 8:44:46 AM
Completed	Security Checked	11/1/2023 8:44:47 AM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

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**Required hardware and software**

Operating Systems:	Windows® 2000, Windows® XP, Windows Vista®; Mac OS® X
Browsers:	Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)
PDF Reader:	Acrobat® or similar software may be required to view and print PDF files
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	Allow per session cookies

\*\* These minimum requirements are subject to change. If these requirements change, you will be asked to re-accept the disclosure. Pre-release (e.g. beta) versions of operating systems and browsers are not supported.

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- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify Deloitte as described above, I consent to receive exclusively through electronic means all Disclosures that are required to be provided or made available to me by Deloitte.