



4

Understanding  
and Approach

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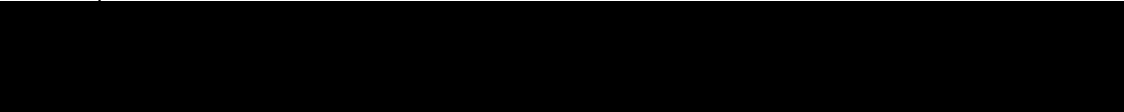
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## 4.1 – Understanding and approach to the CalSAWS integrated multi-contractor environment

### 4.1.1 Understanding

A user's experience does not end when they hit "Submit." The experience of those who use BenefitsCal continues as they move through the decision process, when they receive their benefit, and as they use that benefit. Delivering an excellent user experience on BenefitsCal requires understanding that experience from end-to-end, and designing solutions that offer efficiency even at stages of the process that occur outside of the site. In the BenefitsCal environment, building that experience will require working with all the ecosystem contractors collaboratively, validating that designs are technically feasible and do not cause bottlenecks elsewhere in the process. Only by working as one team can we provide a positive end-to-end user experience.

Accenture has extensive experience managing complex programs that require this tight coordination between stakeholders. We offer extensive, flexible, end-to-end project management expertise, covering a broad array of applications, delivered to clients globally across 40 industries. Accenture has more than [REDACTED] deeply skilled project management specialists who enable us to quickly ramp up, onboard, scale, support, and run large projects. We have led the market for more than 30 years doing complex system implementations and helped set the standards and methodology for innovation in project management and integrated value management. We have helped states and localities realize the most efficient outcomes, including:

- On-time delivery
- Reduced operations time
- Reduced delivery risk through increased emphasis on planning and mobilization
- Greater control of financial costs through proactive, regular analysis of scope and outputs, and a commitment to zero or limited change orders

Accenture employs over [REDACTED] certified Project Management Professionals (PMP). We also support more than [REDACTED] Ports, Protocols, and Services Management (PPSM) Community of Practice (CoP) members who collaborate to share success stories, develop leading practices, and help shape assets and collaterals. Accenture will control the resource plan for BenefitsCal M&O Services and staff our team in alignment with the resource plan.

### 4.1.2 UA1

Describe your approach to managing your scope of work and how you will coordinate with other involved CalSAWS contractors and the CalSAWS Delivery Integration Team to ensure understanding and agreement of the roles and responsibilities of each Contractor and the Consortium.

Accenture has extensive experience working in a multi-contractor environment to provide integrated service delivery to our clients. We have a very strong record of doing this effectively in our current work for CalSAWS and the State of California. Our successful approach to managing work has been proven at CalSAWS, and now we want to bring this successful approach to BenefitsCal.

#### 4.1.2.1 Guiding principles to managing scope and coordinating with other contractors and the Delivery Integration Office (DIO)

The foundation for success of working with other contractors and the Delivery Integration team is built around our people and how we mold them around the guiding principles.

##### 4.1.2.1.1 Building trust through transparent communication

We all know that even frequent communication is not sufficient if there is not a foundation of trust. We need to communicate effectively, early, and often regarding the work we are delivering, and we also need to set a standard of complete transparency to build a stronger foundation of trust between CalSAWS contractors and the Consortium teams.

##### Enable transparency

Our long-term success at CalSAWS has been centered around our people's willingness to do what is right and communicate openly without hesitation. Through our engagement surveys and staff conversations, we know a major driver for why we retain our best staff for longer is because they know they can practice transparency in all phases of our delivery and operations cycles. Our team does not fear raising hard issues, nor do they try to sweep them under the rug or deflect blame. Instead, we build and model transparent communication across our one team to more quickly surface and resolve issues. Our transparent approach has helped us grow a strong lasting relationship with the counties, state agencies, and other CalSAWS contractors. We thrive and operate with more confidence in an environment where we can communicate transparently.

##### Establishing trust

To be one team, trust must be established among contractors, the Consortium, counties, advocates, and other stakeholders. Our One Team concept emphasizes the importance of working together to achieve shared goals and deliver exceptional results. It is a core value that guides Accenture's approach to working with clients, partners, and colleagues. The concept is based on the belief that by working together as one cohesive team, we

### Experience in a multi-contractor environment:

- ✓ CalSAWS, CalSAWS Consortium
- ✓ Ohio Benefits, State of Ohio, Department of Administrative Services (DAS)
- ✓ HealthCare.gov/Federally Facilitated Marketplace (FFM), Centers for Medicare & Medicaid Services (CMS)
- ✓ California Vaccine Management Project (CalVax), State of California, California Department of Public Health (CDPH)
- ✓ Health-e-Arizona Plus (HEAplus) Maintenance and Operations (M&O)
- ✓ State of Arizona, Arizona Health Care Cost Containment System (AHCCCS)

can use diverse perspectives, expertise, and capabilities to drive innovation, solve complex problems together, and deliver value to clients.

We do this by designating points of contact for all contractors, enabling for open lines of communication. We build relationships across the teams to work in the One Team model. Trust is built over time as relationships develop between teams. Each team meeting their commitments helps to build this trust.

Accenture fosters trusting relationships by prioritizing client-centricity, using expertise and experience, promoting cooperation and empathy, creating value, and driving continuous innovation.



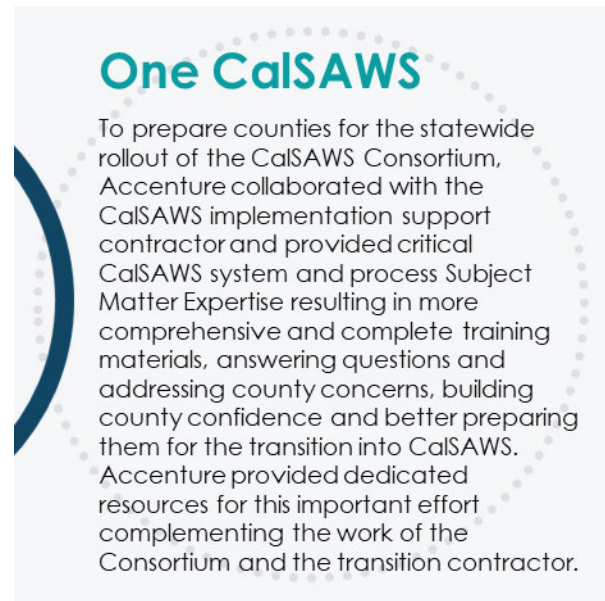
#### 4.1.2.1.2 Collaboration-first approach



Our collaboration-first approach is rooted in the idea that we are smarter and better together. CalSAWS selects its partners based on their extensive expertise and experience, and that experience becomes even richer as they deliver for and with the Consortium. We firmly believe that we will come to a better answer with the best minds from each partner and from the other stakeholders throughout the process.

Our approach focuses on working as one CalSAWS team first, putting the residents' and counties' experience as a priority. We want to avoid silos when working with other contractors and discuss any gaps in roles and responsibilities once the right solution is agreed to. This approach to managing scope enables us to quickly provide recommendations or enhancements to solutions.

**One Team:** BenefitsCal is an integral part of CalSAWS. Our people have always operated in the best interests of the project, which has enabled us to foster the One Team model. When managing the scope of work, we want to use the expertise of each organization to deliver high-quality work swiftly. For each individual effort, it is best to work as a single unit when recommending the right solution to users, beneficiaries and counties, and to collectively discuss solutions to production escalations. Our team will continue to contribute to the One Team model and verify we are demonstrating our guiding principles at governance and public-facing meetings such as the Joint Powers Authority (JPA) and Project Steering Committee (PSC) meetings, Consortium Cultural Transformation and Inclusion initiatives, and Diversity, Equity, Advancement initiatives.





**Shared objectives for success:** For a multi-contractor environment to succeed, it is imperative that all participating organizations define and align on a common set of objectives from the start. Such shared objectives answer the following questions: How do we define shared success? What are the guiding principles to which we can all agree? How do we individually contribute to the shared success? As part of the Transition-In process, we will work to align these objectives as the foundation for our successful working relationship.

#### 4.1.2.2 Seamless integration with the Delivery Integration team

Whether it is an issue in the production or the delivery of an enhancement that impacts multiple contractors, the DIO will be an integral part of all multi-contractor situations. Our team will take this a step further by confirming we have great representations in all situations and further our relationships with other contractors. Lisa Salas, our Project Manager, will work with her counterparts on the other contractor teams to confirm alignment on the overall project objectives, schedule, and tasks. We understand that working in a multi-contractor environment can be tough. We believe that our approach to cooperation and transparency will further improve how we deliver work for cross-platform integrations and increase confidence from the users and counties that we are delivering our best.

We understand that the Delivery Integration team was built with the goal of managing the governance structure and processes for an integrated multi-contractor environment. We intend to participate and engage effectively with the Consortium and other CalSAWS contractors in the administration and continuous refinement of the delivery integration framework.

- Adhering to communication protocols:** Our goal is to provide a "no surprises" experience. We will follow the BenefitsCal Communications Management Plan. We will provide the following deliverables during the Transition-In: **BenefitsCal Transition-In Master Plan (BenefitsCal TIMP), BenefitsCal Services Plan and Operational Working Documents (OWD), BenefitsCal Transition-In Work Schedule, and BenefitsCal Transition-In Test and Validation Plan.** Our team will also represent the best interests of CalSAWS in communicating status updates regarding BenefitsCal at governance meetings such as the JPA and PSC meetings and will collaborate effectively with other CalSAWS contractors and the Consortium aligning on unified messages.
- Frequent, open communication:** We will set up regular meetings between the PMO and the DIO and between other workstream teams for ongoing communication. Managing scope and coordinating with other contractors encompasses all levels of the software development lifecycle and M&O phases. Sharing updates on current status and open topics is key to a successful integrated multi-contractor environment.
- Balanced scorecard:** Table 4.1-1 illustrates an example balanced scorecard (BSC) we propose to measure the effectiveness of our joint efforts with the other CalSAWS contractors that the Delivery Integration team will have visibility into. The metrics provided must be meaningful and provide insight into how BenefitsCal is working in collaboration with other applications. The purpose of the BSC is to measure areas such as BenefitsCal adoption by the end-users, improvements to county workers business process and how well each of the contractor teams are working together to meet that measure. Providing visibility to such metrics will help to deliver your desired outcomes. This is an example of "you get what you measure."





BenefitsCal end-user metrics	County Worker impacts
<ul style="list-style-type: none"> <li>• # of unique site visits per day</li> <li>• # Applications submitted</li> <li>• # Abandoned applications with average completion percent</li> <li>• Average time for application completion</li> <li>• # of self-serve action completed</li> <li>• Estimated time saved by end-user</li> </ul>	<ul style="list-style-type: none"> <li>• percent of new programs resulting from BenefitsCal</li> <li>• # documents uploaded</li> <li>• # of RE/SAR processed from documents received from BenefitsCal</li> <li>• # of tasks generated from BenefitsCal</li> <li>• # of automated processes completed via BenefitsCal Self Service.</li> <li>• Estimated time saved by County Worker</li> </ul>

Table 4.1-1. The BSC provides a balanced approach to measuring success based on outcomes.

An example of the collaboration between different contractors in support of the above measures is when the state proposes a set of new forms that are required to support a new program that is being added to CalSAWS and BenefitsCal. The M&E contractor will create the forms, add the barcodes and send them to the Central Print contractor when they are ready to be sent out. The new forms will need to be automated on BenefitsCal for ease of use for the user. To make things easier for the user, BenefitsCal will use the CalSAWS API data to pre-fill basic data for the user that they can edit. The data will transfer through the API made by the M&E contractor to a page that can be accessed by the county workers. The Workers instead of having to do data entry will transfer the data to the user's case. When this document is due, a notification will appear for the user on BenefitsCal making them aware with a due date and link to the new automated flow created by BenefitsCal. M&E Vendor will send an automated text/email to the user as well, letting them know they have a new form request from their county worker. In case the user cannot access their account, the form will also be mailed by the Central Print contractor. Before implementation of a large number of forms, Infrastructure team will evaluate if there are enough services available to support the new change, and performance testing will occur to verify. This requires collaboration between Accenture as the BenefitsCal contractor, CalSAWS Infrastructure and M&E contractor, and Central Print contractor through all stages of discovery through design, test, and implementation.

We will report the value-based KPIs driven by the BenefitsCal leadership's strategic direction, which will cover BenefitsCal-targeted value areas.

**Conflict resolution:** Following common objectives and communicating transparently greatly reduces conflict. Whenever conflict arises, we follow our defined process for conflict management to identify and resolve issues that may arise and require a course correction—keeping our teams on track, motivated, and successfully delivering to the counties. Drawing upon our One Team culture and trust-based relationships, we will seek to understand problems with the best interests of the counties and the Consortium in mind and focus on solutions that serve users. We outline our steps to resolve conflicts in Figure 4.1-1, which involves specific teams at targeted steps along the journey. These include:

- **Step 01** – Identify the issue and come together with other contractors to understand the full impact across the BenefitsCal environment and other impacted integrated applications, leaning on our guiding principles of transparent communication and collaboration-first approach.

- **Step 02** – Communicate to the Delivery Integration team via our Project Manager the conflicts under review, recommendations to resolve conflicts, and the actions we are taking to address them.
- **Step 03** – Seek clear direction of resolution of the integration challenges or disputes working alongside the Delivery Integration team. If resolution cannot be determined, the dispute will be escalated through the CalSAWS governance process.
- **Ongoing** – As we work together to create options to resolve the conflict, we will verify that the Consortium and the DIO understand the available options, can provide their perspectives, actively monitor the situation, and contribute additional or alternate solutions. This also enables the DIO to provide a recommended solution to the stakeholders, drawing upon our inclusive and synergetic One Team culture.



Figure 4.1-1. Our conflict resolution steps outline how we work together through issues and create solutions for teams.

Our Project Manager will work with the Delivery Integration (DI) team Consortium and contractor counterparts after the completion of each shared initiative to identify areas for improvement. We will use the retrospective results to develop and implement process improvements for the delivery of future objectives.

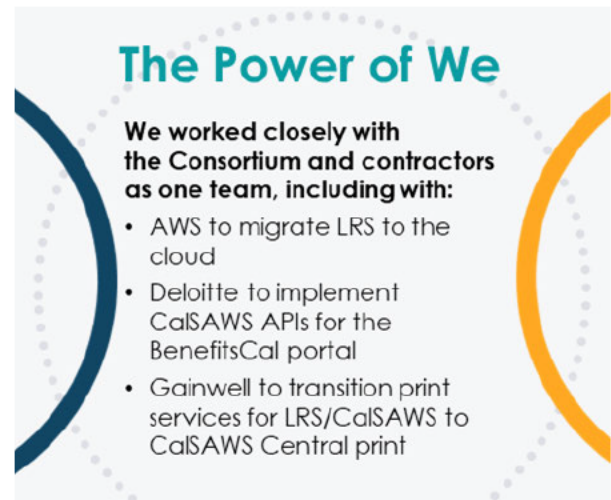
Our approach aligns with the Consortium's requirements by:

- Working with the DI team according to the defined governance structures and processes by providing regular status reports to keep the DI team informed on the activities conducted by Accenture and raise issues as necessary
- Working with the Consortium, State partners, and other CalSAWS contractors through standing management and committee meetings to maintain and improve BenefitsCal as defined in the BenefitsCal PCD and BenefitsCal Services Plan

### 4.1.2.3 Managing the scope of work

Through the DIO, the Consortium has set the foundation for a unified vision with consolidated and aligned priorities, effective decision-making, and accelerated outcomes. BenefitsCal has many interdependencies on other applications, which means we must manage the scope of work and synchronize with other CalSAWS contractors to achieve a well-built solution with the users and counties in mind. Our team has successfully done this for years at CalSAWS and have considered our successful implementations in multi-contractor efforts. Our proposed approach to managing the scope of work includes:

- An integrated CalSAWS organization with BenefitsCal providing an access channel for users via the Collaboration Model
- An integrated delivery framework where multi- contractors join forces to provide recommendations to solution so they can support the needs of all users
- A well-documented change process that is easily understood and used by all impacted CalSAWS contractors, keeping other contractors' processes in mind to increase efficiency for applying changes to BenefitsCal and the CalSAWS ecosystem,
- Advancing BenefitsCal's supporting technologies with the pace of evolving technologies and embracing innovations that improve the effectiveness of the business and the strengths of BenefitsCal's security framework



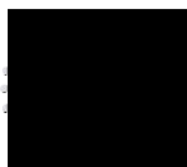
As part of effective project management, we will operate in accordance with the CalSAWS Enterprise Project Control Document (PCD). We will team up with the Consortium, State partners, and other CalSAWS contractors as directed by the DIO. We will support the change management activities led by the other contractors or the Consortium. Accenture recognizes the importance of the CalSAWS Strategic Plan, its reflection of the CalSAWS future vision, and the capacity that will be needed to deliver on future changes over the next five years. Accenture will actively participate in the development of the CalSAWS Annual Strategic Plan and be responsible for the activities related to BenefitsCal. We will work with the other contractors to determine any points of integration or cooperation needed.

#### 4.1.2.3.1 Delineating roles and responsibilities with CalSAWS contractors

Managing the scope, collaborating and coordinating with other CalSAWS contractors begins at Transition-In, and is key to both a successful and complete transition that minimizes business disruption, maintains operational continuity, verifies that all SLAs are met throughout the transition period and lays the foundation for successful ongoing operations.



**James Yemm**  
Transition Lead



**Lisa Salas**  
Project Manager



**Lulu Fou**  
PMO Lead

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**Clearly defined roles and responsibilities:** Our Transition Lead (James Yemm), Project Manager (Lisa Salas), and PMO Lead (Lulu Fou) will meet with the incumbent contractor, the Consortium, and other CalSAWS contractors leading our efforts to establish this foundation. Each contractor needs to have a clear understanding of their responsibilities and dependencies for other contractors and be accountable to deliver accordingly. Accountability helps drive trust and transparency. With the oversight of the DIO, we will jointly develop an integrated RACI with the Consortium and other CalSAWS contractors that will be maintained and periodically reviewed throughout the duration of the contract. An integrated organization chart will also be developed and maintained within the CalSAWS project's existing tools for access by all project staff. This will reduce gaps and confirm cross-team agreement of processes, leading to better contribution and shared success. In addition, we will review the statement of work (SOW) and assumptions and identify gaps and overlaps in the contractors' scopes of work and work schedules. We will review the BenefitsCal PCD and related OWD to confirm our understanding. This will help to minimize the impact on the users of BenefitsCal, counties, and CBOs.

**Proactive identification and resolution of gaps, overlaps, or conflicts.** Our PMO will develop, deliver, and maintain BenefitsCal Transition-In Work Schedules using Microsoft Project. We will work together with the DIO and other CalSAWS contractors to integrate the schedules into the M&O Integrated Work Plan that will align the workstreams. If there are gaps in scope or disputes in approaches, we will synchronize efforts with the other CalSAWS contractors through our Project Manager, Lisa Salas, to resolve them, and only if needed, will use the DIO for escalations. We will also manage and monitor the BenefitsCal Work Schedule that will be incorporated into the Consortium's Master Work Schedule.

**Monitoring and reporting on the effectiveness of our joint work as contractors.** Our Project Manager will work with the CalSAWS Chief Deputy Director, the DIO, other contractor Delivery Integration Managers, and the CalSAWS leadership team to define, adopt, and monitor key performance indicators (KPIs) that measure contractors' impacts on the Consortium and counties' business outcomes and that complement contractual SLAs.

**Operating level agreements (OLAs).** It is important to understand the service



dependencies and have clear accountability when using multiple teams and contractors to deliver service. The stakeholders will expect end-to-end performance, yet multiple parties may be involved in delivering their specific services/components. Establishing OLAs (the definition of interdependent relationships in support of SLAs) that describe the responsibilities of each contractor to other contractors, including process and timeframes, will create clear accountability. Achieving the OLAs will drive the end-to-end objectives of meeting our SLAs and delivering changes and enhancements to production on time, within budget, and that meet user expectations.

These OLAs will greatly reduce the risk of changes with dependencies on other contractors being requested by either contractor in isolation, improve the tracking mechanism, and minimize urgent requests that puts strain on the receiving contractor(s) to complete the tasks. A well-structured OLA will help drive expectations and commitments for general tasks and requests between contractors and can be managed within existing CalSAWS project tools such as JIRA or ServiceNow, or another agreed to tracking tool that works well for all contractors. It is also important to track different elements such as the



contractor requesting the work, the contractor requested to do the work, due dates, priority, and a description to ensure work can be completed based on the documented requirements. In a multi-contractor environment, we often have requests as small as a deployment request from the Infrastructure contractors, or a request to deliver a change by the M&E Contractor to integrate with a BenefitsCal enhancement, it's important to have requests be transparent and traceable so we can all hold each other accountable for tasks that impact one another. These OLA will also help us meet expectations of our partner CalSAWS contractors on a consistent basis and help us identify areas of improvement so appropriate steps can be taken.

Our approach aligns with the Consortium's requirements by:

- Performing daily M&O according to the BenefitsCal Services Plan and OWDs while maintaining open communications with the Consortium and other CalSAWS contractors ensure that integrations are successfully maintained, and we are able to meet the CalSAWS business/technical requirements and service levels
- Working with the Consortium, State partners, and other contractors through a regular meeting cadence and open communication channels to coordinate cross contractor/system integrations, testing, and reporting

#### 4.1.2.3.2 Project management

Our project management approach is guided by principles we do not stray from. These principles, as outlined in Figure 4.1-2, increase collaboration, enhance communication, and reduce risk. Throughout project implementation and in alignment with these principles, Accenture will adhere to project governance as agreed upon with BenefitsCal and to the Delivery Integration framework.



Figure 4.1-2. We maintain consistency through our guiding principles for project management.

These principles are important for two reasons. First, they promote implementation consistency across the project. Secondly, they increase visibility into project health through proactive monitoring and progress reporting. Other benefits include:

- Reliability at scale, using a common set of methods, tools, and processes
- Transparency through tighter controls, governance, standard indicators, and reporting
- Business and information technology (IT) alignment on outcomes and performance measures
- High-quality, predictable results throughout the project lifecycle

To address reporting-related and relevant information regarding how the requirements are subject to modification activities, design, coding, testing, and production, we will deliver a **BenefitsCal Requirements Traceability Matrix (RTM) and Report**. Figure 4.1-3 describes the project management processes we bring to manage our scope of work as we navigate the integrated multi-contractor environment and the vision of the Consortium.

To put these processes in place and achieve the objectives of an integrated multi-contractor environment, we will work collaboratively with all key stakeholders during the transition. We use dashboards and reports to communicate progress and status of the various efforts to all stakeholders throughout transition and ongoing operations. We will, at the request of the Consortium, provide recommendations for continuous process improvement and innovation on our dashboard technologies and related designs.

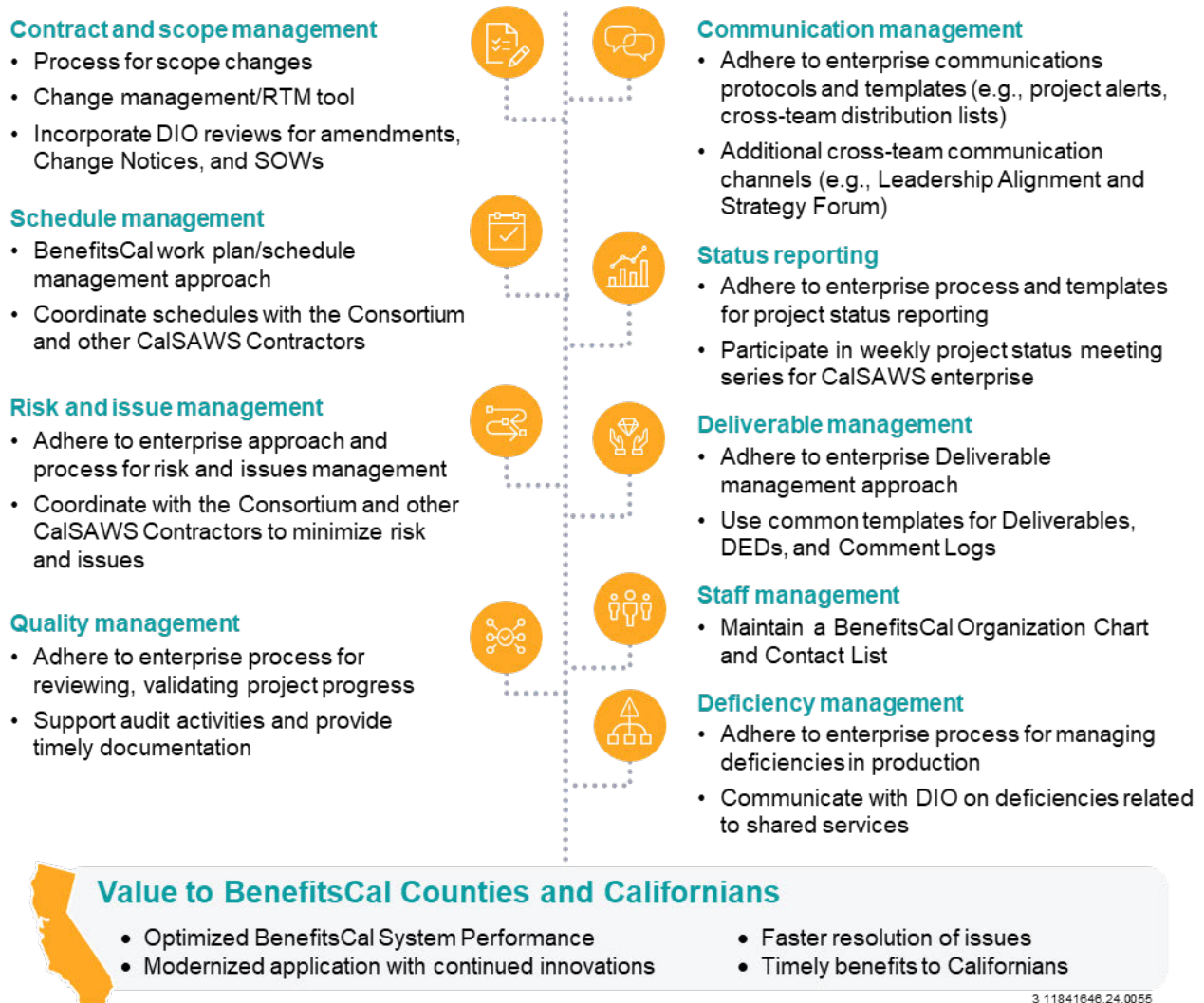


Figure 4.1-3. Proven project management processes enable us to effectively manage the scope of work for better delivery of services to the counties and Californians.

### 4.1.2.4 Our approach in practice

Managing scope and coordinating with other CalSAWS contractors happens in all aspects of our day-to-day work, especially in the areas of Transition-In, System Change Requests, and Transition-Out.

#### 4.1.2.4.1 Transition-in

In preparation for the Transition-In phase, Accenture will meet with the Consortium and other CalSAWS contractors to develop the BenefitsCal Transition-In Master Plan. We carefully consider the needs of the incumbent contractor's Transition-Out Plan, their constraints and challenges in providing BenefitsCal services during the Transition-In period and meeting SLAs. We also consider the dependencies on the other CalSAWS contractors. The transition process does not take place in a bubble and relies on transparent communication to address all potential gaps and risks.

We will work with the incumbent contractor and other CalSAWS contractors, to schedule and conduct knowledge transfer (KT) sessions. During the meetings, we will review the existing BenefitsCal documentation to confirm understanding and ask clarifying questions as needed. This will include reviewing current processes, procedures, scripts, and workflows.

During this time, Accenture will perform a gap analysis and look for opportunities for improvement. We will analyze current business processes to identify possible changes to increase the efficiency of the processes. The output of this analysis will be shared with the Consortium for consideration and further discussion with the other contractors as applicable.

As we build our relationships with the other contractors, we set in place clear lines of communication, providing each contractor with a primary and secondary contact.

#### Extensive experience in transitioning services from incumbent service providers:

- ✓ 3,000+ transitions
- ✓ 350+ transitions in the past 2 years
- ✓ [REDACTED] dedicated transition professionals
- ✓ 96%+ successful go-live events as per plan



### Transition-In readiness

In preparation for assuming production operations, we will conduct BenefitsCal Transition-In readiness reviews with the Consortium and other CalSAWS contractors as applicable. Reviews will be conducted for management, SCRs, marketing and public communications, support services, enhancement and innovation, production operations, technology recovery, and security. Our team will be fully prepared to demonstrate our readiness to assume operational control and responsibility for fulfilling support requirements within the Transition-In timeline.

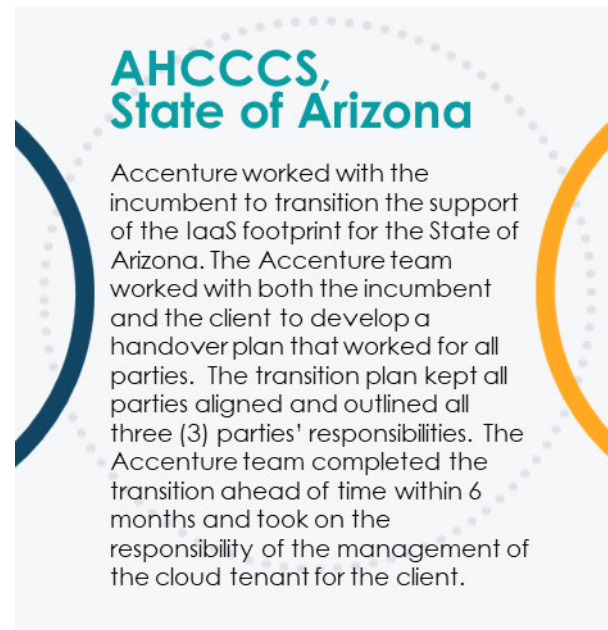
As we move to operations, we will assess all in-progress enhancements in the prioritized backlog and jointly agree to a plan to assume responsibility for in-progress enhancements. We will provide a **BenefitsCal Monthly Service Level Agreement Performance Report** to keep the Consortium informed of SLAs. We will also adhere to the approved SCR development and implementation schedule and budget.

Our approach aligns with the Consortium's requirements by:

- Creating a BenefitsCal Transition-In Master Plan (BenefitsCal TIMP) and reviewing with the Consortium and other CalSAWS contractors, as applicable, to reach agreement on tasks and timing
- Performing Transition-In tasks per the BenefitsCal Transition-In Work Schedule with the Consortium and other CalSAWS contractors, as applicable, as scheduled to ensure an on-time transition
- Conducting regular meetings for all parties involved in the transition and providing clear documentation of status of the transition in a timely manner
- Conducting BenefitsCal Transition-In readiness reviews with the Consortium and other CalSAWS contractors as applicable
- Developing, delivering, maintaining, and executing a BenefitsCal Transition-In Test and Validation Plan in cooperation and coordination with the Consortium, State partners and other CalSAWS contractors

#### 4.1.2.4.2 System change requests

System change requests (SCRs) for BenefitsCal will need to be managed by working with the other contractors. In most phases of the SCR software development lifecycle (SDLC), dependencies and impacts on the other systems will need to be identified and assessed. Constraints, such as available staff or other scheduled releases, will also need to be identified. Even if there is no change for the other contractor, they will need to be involved in testing to confirm that the change being made did not impact the integration with that system. Our approach to managing scope and coordinating with other CalSAWS contractors reduces downstream system issues, enables great user experience, ensures



high software quality and on time delivery to production. Our people are integrated in the BenefitsCal process and have actively provided recommendations and driven improvements on existing enhancements and the BenefitsCal SCR process and will continue to do so as the primary BenefitsCal contractor. The following are some examples of how we will manage scope and coordinate with other contractors to confirm we are prioritizing the needs of users, the Consortium, and CalSAWS in each phase of the SCR SDLC while staying aligned with the other contractors for successful delivery.

#### 4.1.2.4.2.1 SCR discovery and design

SCR discovery and design is a key input to implementing enhancements that are impactful and provide the most value to users and counties. Given the dedicated capacity to enhancements, it is imperative to present and recommend enhancements through the Collaboration Model and by using our guiding principles of transparent communication and a collaboration-first mindset.

**Transparent communication:** Building trust with the users, counties, State partners, and advocates within the Collaboration Model will happen if we are transparent in our communications with what is possible within the available capacity. Providing ongoing feedback as an expert in the system and other integrated applications enables us to help bridge end-to-end experience when considering a fully integrated design that supports both the users and counties.

**Teaming up:** Collaboration with the users, counties, State partners, and advocates within the Collaboration Model can be most effective if we work together as one team. It is imperative that we represent CalSAWS as a single entity and show confidence in what we are proposing as options to productive enhancements. The BenefitsCal team, other CalSAWS contractors, Consortium, and QA teams can collectively do this by meeting in advance, aligning on the planned topics, working through different design scenarios, use cases, questions and clarifications needed within the model. Just like we've done today with the "Self-Service Portal – Support Requests" effort that went into production in January 2023, our team worked well with the existing BenefitsCal team to provide recommendations on how to handle task errors created for a support request to a county worker. A new API was deployed to production to handle an end-to-end scenario to provide the residents with the support they needed from a county worker. This approach to collaboration increases confidence in our partner organizations and enables our discussions with them to be much more productive, leading to faster decision making to proceed with one enhancement or recommendation over another.

Our approach aligns with the Consortiums' requirements by:

- Using the Collaboration Model to gather feedback and potential impacts for proposed changes from residents, counties, CBOs, State and advocate stakeholder groups
- Working through the change control process to present SCRs and prioritize those changes to BenefitsCal in coordination with other changes occurring in the CalSAWS ecosystem
- Working with the Consortium, State partners, and other contractors, per the BenefitsCal Services Plan and OWD, to capture and validate requirements and design specifications for approved SCRs

- Working with the CalSAWS Infrastructure and M&E contractors to identify any new technologies and/or changes that may be needed on the CalSAWS side to meet BenefitsCal SCRs
- Working with the CalSAWS infrastructure and M&E contractors to develop and agree on API, Security, System Performance and other design aspects applicable to each SCR
- Managing production planning in coordination with other contractors and in alignment with the Consortium's annual production release schedule, identify and document all release related required activities and dependencies with CalSAWS contractors

#### **4.1.2.4.2.2 Build and test**

Our collaboration-first approach will be on full display throughout the build and test phases. It is in our best interests to verify that all CalSAWS contractors we work with are aligned on all aspects of build and test to manage the scope and coordinate effectively. Through the build and test phases, Accenture will work with each of the CalSAWS contractors. The level of involvement will vary based on the change being implemented.

If the system update requires a change that impacts another system, Accenture will work with the other contractor(s) to plan and execute integrated testing at each phase in the process as applicable. If the change does not impact the integration with another system, Accenture will work with the other contractor(s) to plan and execute regression testing. Where possible, our team will coordinate with other CalSAWS contractors and external contract partners to set up environments that support integrated, end-to-end test validation in a production-like manner and that also use masked or unmasked data where possible. Our team today helps support the existing BenefitsCal team by setting up data to support validation for end-to-end test scenarios for defect and SCR validation, often times providing guidance on worker impact when identifying improvements that could be made in the change being made. As the BenefitsCal Contractor, our team with the functional expertise of the CalSAWS system can help identify M&E contractor data needs accelerating the time to reach agreement with the M&E contractor. Joining forces effectively with other CalSAWS contractors and external contractors is vital to performing such validations and will help confirm we are delivering high quality work to production.

Our approach aligns with the Consortium's requirements by:

- Using regular change control and release planning meeting and communications with Consortium, State partners, and other contractors including external interface partners to coordinate testing efforts, including what environments we need for different types of test (integration testing, performance testing, ADA testing, regression testing, security testing), what test bed/test data will be used for each type of test, how any data synchronizations will be ensured, how defects will be recorded, reported and be managed through resolution
- Planning for and providing test support for baseline release County Validation testing that includes providing access to test environments, performing smoke testing, providing system design walkthroughs before system releases, analyzing reported incidents, jointly prioritizing fixes with County Validation team for defects, resolving and retesting defects
- Collaborating with the CalSAWS M&E and Infrastructure contractors to provide API integration testing, performing data changes, and doing data refreshes

- Developing and maintaining regression test scripts, conducting batch execution that impact multiple applications use end-to-end scenarios
- Executing production readiness and green light activities with the Consortium, State partners, and other contractors, as appropriate, and provide the Certification of Successful Production Release before releasing SCRs to production.

#### 4.1.2.4.2.3 Innovation and continuous improvement



By proactively exploring, identifying, analyzing, and evaluating technology innovation and formulating recommendations for potential inclusion to the BenefitsCal application, we will confirm that other partner CalSAWS contractors are also involved in the end-to-end experience. Roles and responsibilities are defined well before presenting recommendations to the Consortium and our partners within the Collaboration Model. By communicating transparently and working as one team, we will effectively manage the scope and confirm that all impacted CalSAWS contractors have input into the proposed innovations and improvements to the existing processes.

Our approach aligns with the Consortiums' requirements by coordinating with the Consortium, State partners, and other contractors per the BenefitsCal Services Plan and OWD to manage and execute enhancement and innovation activities.

#### 4.1.2.4.3 Transition-Out

At the time of Transition-Out, Accenture will develop a BenefitsCal Transition-Out Work Schedule. This will outline the activities and timeline to transition BenefitsCal to the Consortium or another contractor. Our approach to managing scope and coordinating with other CalSAWS contractors for Transition-Out will have the same rigor and performance that we describe above for Transition-In.

Our approach aligns with the Consortiums' requirements by:

- Managing the completion of all Transition-Out tasks in the Transition-Out Master Plan by working with the appropriate contractors
- Creating and managing a BenefitsCal Transition-Out Work Schedule through regular meetings with the Consortium and other CalSAWS contractors, as applicable, according to the BenefitsCal Transition-Out Plan



## Key highlights of our approach

<b>Working together</b>	<ul style="list-style-type: none"> <li>A collaboration-first approach focuses on working as one CalSAWS team, putting the user and counties experience as a priority.</li> </ul>
<b>Building trust</b>	<ul style="list-style-type: none"> <li>Building trust with the users, counties, State partners, and advocates within the Collaboration Model will happen if we are transparent in our communications.</li> </ul>
<b>Transparent communications</b>	<ul style="list-style-type: none"> <li>By implementing transparent communications and our collaboration-first approach, guided by RACI and OLA established with each CalSAWS contractor (both Infrastructure and M&amp;E contractors) at the beginning of transition and before operations we will effectively manage the scope in the multi-contractor environment.</li> </ul>
<b>Continuous improvement and optimization</b>	<ul style="list-style-type: none"> <li>With a relentless focus on continuously improving the overall experience for all users, we identify and implement improvements to how we manage our work and how we collaborate with other CalSAWS contractors.</li> </ul>

## Key deliverables

## Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal Transition-In Master Plan (BenefitsCal TIMP)</li> <li>BenefitsCal Service Plan and Operational Working Documents</li> <li>BenefitsCal Project Control Document</li> <li>BenefitsCal Requirements Traceability Matrix (RTM) and Report</li> <li>BenefitsCal Work Schedule</li> <li>BenefitsCal Monthly Service Level Agreement Performance Report</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.</li> <li>Working cooperatively for benefit of entire CalSAWS.</li> <li>Establishing and sustaining cooperative relationships with CalSAWS contractors.</li> <li>Support ongoing refinement of DI processes and procedures.</li> <li>Adhering to the CalSAWS Collaboration Model to identify, prioritize, and develop BenefitsCal enhancements.</li> </ul>
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### 4.1.3 UA2

Describe your approach to working and collaborating with the CalSAWS M&O Contractor(s) to perform shared services, such as security, and supporting services such as Service Desk, production operations and system performance.

#### 4.1.3.1 Understanding

In this section, we describe our approach to working with the CalSAWS M&O contractor(s) to perform shared services such as security and support their application evolution and innovation scope of work. At the heart of our approach is the desire to lead with industry-leading proactive security measures. We understand in this multi-contractor environment, cooperation between contractors will be vital to operating together as one CalSAWS. Everyone has a role to play in security. We will work collaboratively with BenefitsCal and the CalSAWS M&O contractor(s) to focus on the common objective and desired outcomes first, and then we will mutually determine the next steps and identify which parties are responsible for each step.

#### 4.1.3.2 Methodology/approach

##### 4.1.3.2.1 Security



We know how challenging the recent security issue was for the Consortium. At Accenture, our team worked collaboratively with the relevant stakeholders, including the BenefitsCal contractor, Consortium Security, and county representatives to share intelligence and information as part of the investigation and efforts to contain and remediate the attack. Our entire team understands firsthand the importance of a delivery strategy that puts Security at the forefront of all the Consortium's initiatives.

One of our first objectives as we begin providing security services as the BenefitsCal M&O contractor would be to support the Consortium in strengthening the portal's security posture. We would immediately start working with our partner contractors for other integrated applications as part of that effort. Consistent with the Consortium's updated security policies, we will review and confirm that all areas containing sensitive information are protected using two-factor authentication (2FA) and that integration points between applications are secure on both entry and exit points. We will also support the Consortium in making decisions about further proactive monitoring and alerting for potential unusual behavior from bad actors as part of our system performance approach. Our expertise managing and maintaining a multitude of high-profile applications with important data, highlighted in Table 4.1-2, enables us to help the Consortium put measures in place to verify that it is aligned with industry best practices. We will review any newly published industry security standards with our partner M&O contractors and continue to propose enhancements to the BenefitsCal application to help the Consortium stay ahead of threats to its systems.

**In the recent security incident with BenefitsCal, Accenture worked collaboratively with all partners to coordinate identification of the threat, mitigation of the impact, resolution of the issue, and notification to the impacted customers.**



Table 4.1-2. Accenture brings BenefitsCal a breadth of security experience.

Accenture will collaborate with the CalSAWS contractors for ongoing Security operations to perform the following in accordance with CalSAWS policy:

- Provide BenefitsCal integration design and testing support during CalSAWS infrastructure updates, any security patching focused on identifying and resolving issues before the changes are implemented in production
- Monitor security related SLAs and take corrective actions
- Document security controls in the **BenefitsCal System Security Plan**

Our approach aligns with the Consortium's requirements by recommending the following capabilities for ongoing Security improvements.

- Business continuity resiliency/ransomware prevention: At the Consortium's direction, Accenture will collaborate with other key stakeholders and contractors, including the CalSAWS M&O contractor, to establish procedures to respond to, recover, and restore operations in the event of a potential ransomware attack consistent with the CalSAWS Privacy Security Agreements and applicable legal, statutory, and compliance obligations.
- Intelligence-driven automated and orchestrated response using GenAI: At the Consortium's direction, Accenture will integrate cyber threat intelligence feed with the Splunk SIEM to monitor access to the portal and will apply a security orchestration, automation, and response (SOAR, i.e., Splunk SOAR) solution to automatically remediate findings and proactively prevent malicious activities from occurring within the environment.
- Authentication best practices review: At the Consortium's direction, Accenture will perform a comprehensive security assessment of the authentication solutions in place. We will work with the CalSAWS M&O contractors to confirm that all CalSAWS security system components are appropriately maintained and adhere to security best practices around authentication. We will also confirm they are configured to restrict and monitor traffic between trusted and untrusted connections.



### Our Security collaboration approach brings value to:

- **Users:** Users want to know that their personal information is protected, and robust security measures are in place to ensure that their information is protected from being compromised increasing overall adoption.
- **Counties:** Protecting sensitive data keeps the counties reputation intact. When user's information is secure, it allows the counties to focus on serving applicants with confidence.
- **Consortium:** Knowing contractors are aligned on enhanced security standards and we are collaborating to ensure secure applications in all integrations prevents escalations and security incidents from occurring.
- **Advocates and CBOs:** Confirmation that user data is maintained at industry or above industry standards and protected from being used in a malicious way.
- **State Partners:** With current and potential future integrations with our State Partners, the confidence in our ability to send and receive data in a secure manner allows us to confidently propose enhancements to improve customer experience.

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#### 4.1.3.2.2 Production operations



When handling issues together with other M&O contractors, it is essential to put communication at the forefront while taking action swiftly to remediate issues. By working as one team, we can propose recommendations and solve issues first before determining roles and responsibilities for any gaps that exist in the RACI and/or OLA. We garner support from the CalSAWS contractors to bring in the best minds from all contractors to jointly discuss solutions to problems and then determine owners to quickly resolve the agreed-upon solution.

The success of a great production operations approach requires us to know who can be reached in urgent situations. One of our first objectives as we transition in as the BenefitsCal contractor is to establish a contact sheet for a primary and backup in case of any escalations for overdue tasks from our OLA approach, breached SLAs or urgent production incidents. This is a key piece to a healthy collaboration model to reduce latency of resolution to tasks and issues.

It is also very important to us that all impacted users and corresponding stakeholder groups in our community are informed in a timely manner and that updates are communicated quickly until issue resolution is achieved. In addition to the standard production alerts and notifications processes, it is important that all users are informed of issues and outages to BenefitsCal through existing and new channels using the platforms that exist today. We will contribute to and continue evaluating and proposing changes to our production operations approach so that we can improve how we communicate and resolve issues within project defined SLAs.

In addition to issues, production environments often go through regular maintenance activities and require downtime. As BenefitsCal is heavily integrated with other applications, it is important to communicate scheduled maintenance activities in advance and coordinate well to ensure minimal downtime. Understanding the level of impact to BenefitsCal well in advance enables us to provide appropriate messaging on the BenefitsCal website and send communication to counties and other impacted state agencies and CBOs to inform them of the system being available in a limited capacity. Leveraging our OLA model mentioned in UA1, CalSAWS contractors will communicate requests well in advance and meet to discuss impacts and validations that occur post completion.



Our approach aligns with the Consortium's requirements by:

- Working with CalSAWS infrastructure and M&E contractors on a regular cadence to review production issues, share and discuss planned maintenance windows and impacts, review environmental and capacity updates and changes, conduct root cause analysis, identify and jointly recommend operations improvements with Consortium, and implement ongoing improvements
- Agreeing on timeframes for unplanned upgrades and periodically monitoring how effectively we are minimizing such efforts
- Work with the CalSAWS infrastructure and M&E contractors to keep the OLA updated throughout the term of the contract based on ongoing improvements
- Working with the CalSAWS infrastructure and M&E teams on all CalSAWS Infrastructure and BenefitsCal Infrastructure upgrades that includes evaluation of technologies, scheduling the upgrades, test planning and execution, aligning on technical dependencies and specifications

### Continuous improvement

Continuous improvement is a large part of how we can continually get better as it pertains to assessing our project's reaction to production issues and any potential areas of improvement in the overall SDLC process. CalSAWS has an established approach to continuous improvement via the RCA process. We intend to conform to this process and provide suggestions on ways we can help improve the RCA process over time. We look at drafting root cause analyses (RCAs) as an opportunity to take a step back and assess what caused the issue and how we can avoid it in the future. Our team intends to cooperate with the Consortium, QA, and other partner M&O contractors to confirm we are documenting and executing on improvement strategies to increase the confidence of our response strategies to subsequent issues going forward. Figure 4.1-4 shows our RCA framework.

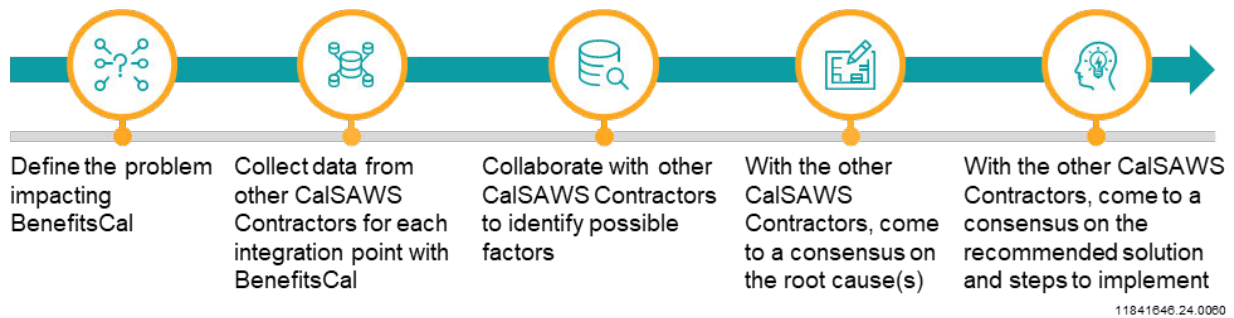


Figure 4.1-4. Accenture's RCA process frames how we will work together with the Consortium and other contractors to uncover and address systemic issues.

In addition to RCAs, our team will garner feedback from different stakeholder organizations on a regular basis to understand what is working well and ways we can continue to improve the production operations leading to better user and county worker experience with the BenefitsCal solution. We understand that the solution must adhere to and align with the processes of 58 counties and as functionality and behaviors of our end-users change over time, continuous improvement channels such as feedback from those impacted end-users gives us a way to assess how we can continue to improve the BenefitsCal system over time.

#### 4.1.3.2.2.1 BenefitsCal Tier 3 Service Desk

Proactive communication regarding issues, especially ones that impact other applications, is important to expedient resolution, maintaining trust and increasing BenefitsCal adoption. We recognize that the BenefitsCal related tickets can originate from several sources including public, CBOs, project staff, and counties. Irrespective of who reported the incident, it is important that those incidents are resolved as quickly as possible at the lowest tier possible to maximize user satisfaction. To enable resolutions at the lowest possible tier and minimize the resolution time, Accenture will collaborate with the CalSAWS Infrastructure contractor, aligning with the Consortium requirements, in the following ways:

- Review the processes and tools currently being used for Service Desk and identify improvements. Given our current experience on the CalSAWS Service Desk, an area for improvement is to see if we and the CalSAWS Infrastructure contractor can improve on the ServiceNow tool to reduce time for analysis and resolution.
- We will use ServiceNow Collaborative Work Management features to create automated workflows that will continually keep us informed of incoming tickets from our partnering M&O contractors, CalSAWS ServiceDesk, and affected users.
- We will meet with the CalSAWS Service Desk on a regular cadence to share technical knowledge on upcoming system releases so they always stay current and abreast of the system.
- Provide regular updates on all outstanding incidents while they are being worked on. The timeframes for regular updates for incidents will depend on incident type and priority and will be defined in the OLA and SLAs.
- Maintain availability of the "sandbox" test environment for the Service Desk Tier 1 and Tier 2 teams to be able to research an incident, evaluate and guide end-users to work arounds or resolutions.

- Provide the information needed through FAQs and Job Aids for the BenefitsCal ServiceDesk team to be able to resolve issues at lower Tiers (Tier 1 and Tier 2) and post relevant information online to be available to end-users.
- Prioritizing ticket resolution, defining fix implementation schedules and sharing this with other CalSAWS contractors and Consortium in the regular meetings
- Seeking input on how well our team is collaborating, identify areas of concern and opportunities for improvement
- Prioritize and implement improvement opportunities



**Our approach to collaboration on Production Operations brings value to:**

- **User:** Quick resolutions to production incidents.
- **Counties:** Transparent communications regarding issues, impacts, and work arounds.
- **Consortium:** Quick collaboration and impact analysis with thoughtful Root Cause Analysis to ensure issues are remediated and do not occur again through continuous improvement.
- **Advocates, CBOs, and State Partners :** Thoughtful communication with updates to ensure all impacted parties are informed timely and regularly throughout the incident resolution process.

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#### 4.1.3.2.2.2 System performance

It is very important for BenefitsCal to work seamlessly, integrate well with other applications, and be highly performant to enhance the experience of the users and reduce impacts to other applications such as CalSAWS, Contact Center, and other external contractors, such as FIS.



- **99.8% uptime success rate maintained on Los Angeles County's LEADER Replacement System (LRS) Project**
- **more than 99.9% system uptime on Texas Medicaid & Healthcare Partnership (TMHP)**

At the outset and as part of Transition-In, Accenture will work with the CalSAWS M&O contractors to establish baseline metrics and agree on expected service levels for the performance of various components.

One of our first objectives will be to understand the current landscape and set up a monitoring and alerting solution with collaboration and enhanced communication in mind to keep everyone informed before issues happen or get out of hand. This information will be documented in the OLA and subsequently guide the development of the **Performance Test Materials Packet**. This will not only provide proactive monitoring and alerting, but also include a system performance dashboard to monitor capacity, usage patterns, and real-time data on the health of BenefitsCal and its integration points with other applications. This can only be achieved by joining forces and meeting regularly with the other application owners to review the overall health and response strategy for issues that are escalated from our system performance monitoring and alerting solution. Our goal is to identify and react to and resolve performance issues before escalations from residents, counties, advocates, CBOs and our state partners. On an ongoing basis, Accenture will



collaborate with CalSAWS Infrastructure and M&E contractors, aligning with the Consortium's requirements in the following ways:

- Establish a regular cadence for upcoming changes to understand performance impact of system changes, identify the resources and effort to implement changes, plan for and conduct performance testing as defined in the Performance Test Materials packet, determine technical dependencies
- Discuss SLAs adherence, review SLA trends, monitor overall system performance, proactively identify opportunities to continually improve system performance
- Develop the runbook to be used when system performance is negatively impacted addressing what actions will be taken by whom based on the business impacts for various scenarios. As an example, when CalSAWS system may be unavailable for system maintenance and/or technology upgrades, making BenefitsCal available only in a limited capacity in a read only mode, including appropriate messaging on the BenefitsCal website, sending appropriate communication to the counties and the Contact center will be part of this runbook.
- Capacity planning by reviewing BenefitsCal transactions trends, user growth, system usage increase based on legislative changes, upcoming system enhancements and staying ahead

#### 4.1.3.2.2.3 API operations

APIs provide the integration between BenefitsCal and CalSAWS. It requires managing the API interface operations in coordination with the Consortium and other contractors. When using existing and developing new APIs, it is important to consider existing functionality and business impacts to the residents and the county workers. Our team works closely with the BenefitsCal contractor today to ensure we are using APIs in the right manner and often provides recommendations to prevent user dissatisfaction from API errors, minimizing the need to use work arounds. We will do the following in collaboration with the CalSAWS Infrastructure and M&E contractors:

- Plan for and conduct API interface operations and testing activities
- Schedule API activities at predetermined, mutually agreed times with the Consortium minimizing disruption to user activity
- Plan for and resolve issues/defects identified in non-production environments related to failed API interface transactions
- Identify opportunities for ongoing improvement of API operations, make recommendations to the Consortium and implement improvements

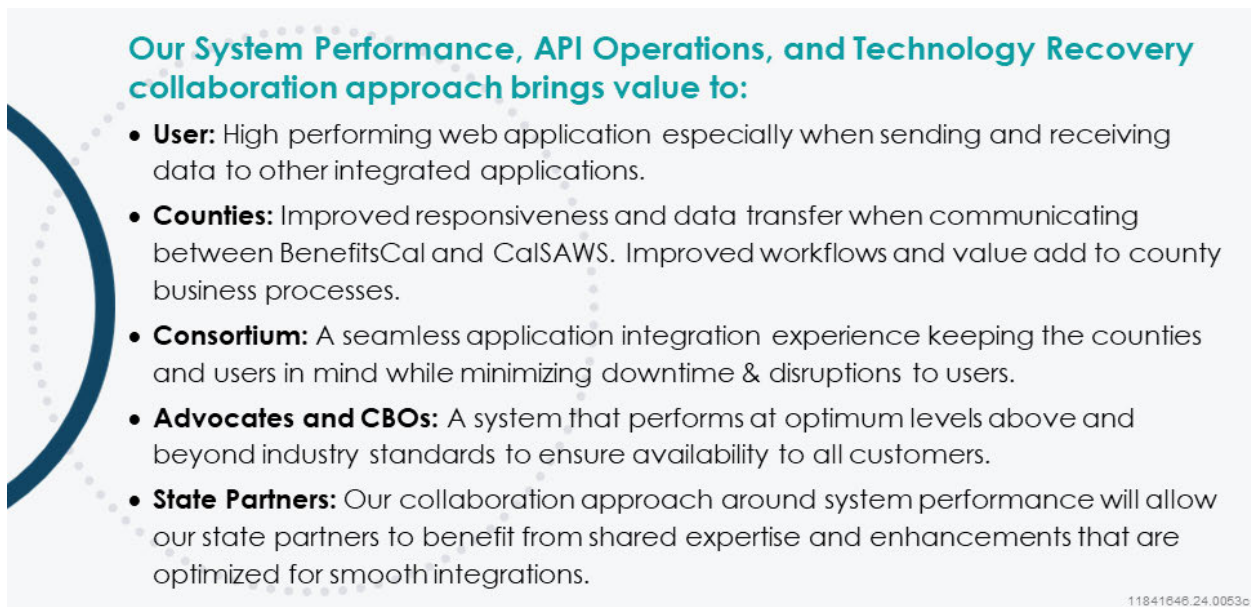
#### 4.1.3.2.2.4 Technology recovery

Accenture will work with the CalSAWS infrastructure contractor, the cloud services provider, and other CalSAWS contractors to reestablish BenefitsCal in the event the primary production deployment becomes unavailable. Advance planning and risk mitigation plans must be in place for a seamless and quick execution. It's one thing to be able to react to planned maintenance and downtime activities, and another to be ready for unplanned scenarios. Our team will be prepared for both Technology Recovery situations by ensuring we deliver a comprehensive **BenefitsCal Technology Recovery Plan** developed with CalSAWS contractors and the Consortium. The plan will include the Roles and Responsibilities of each Contractor, Recovery Strategy, Backup and Offsite Storage

Procedures, System Application Recovery Procedures, Testing, and Communication Approach and Contact List.

Our team will participate in a semi-annual BenefitsCal Recovery Test with the M&E and Infrastructure contractors to validate the end-to-end details of the Technology Recovery Plan and adjust any details or processes to align with our changing ecosystem solution. In the event of an actual technology recovery, we will collaborate with the CalSAWS Infrastructure and M&E contractor to do the following:

- Agree and make recommendations on the recovery schedule
- Communicate the overall recovery plan, seek approval from the Consortium
- Execute and communicate all recovery activities as outlined in the plan
- Conduct a retrospective to identify improvements and plan for implementation
- Prepare the BenefitsCal Recovery Post Event Report that includes the assessment of the response to the incident, opportunities for improvement, and an assessment on performance against SLAs, established recovery timeframes and downtime.



**Our System Performance, API Operations, and Technology Recovery collaboration approach brings value to:**

- **User:** High performing web application especially when sending and receiving data to other integrated applications.
- **Counties:** Improved responsiveness and data transfer when communicating between BenefitsCal and CalSAWS. Improved workflows and value add to county business processes.
- **Consortium:** A seamless application integration experience keeping the counties and users in mind while minimizing downtime & disruptions to users.
- **Advocates and CBOs:** A system that performs at optimum levels above and beyond industry standards to ensure availability to all customers.
- **State Partners:** Our collaboration approach around system performance will allow our state partners to benefit from shared expertise and enhancements that are optimized for smooth integrations.

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#### 4.1.3.2.2.5 Marketing and public communication

While marketing and public communications will be the exclusive responsibility of Accenture as the BenefitsCal M&O contractor, close coordination will be necessary with other CalSAWS contractors.

**Input FROM other CalSAWS contractors:** Changes to the BenefitsCal system or any performance or security issues must be communicated effectively to the general public and BenefitsCal Stakeholders. As part of the BenefitsCal Marketing and Public Communications Plan, we will create a clear process to ensure that the Customer Outreach and Marketing team is aware of all changes and incidents in a timely manner and has a consistent mechanism for sharing information with all affected shareholders and the public.

**Input TO other CalSAWS contractors:** Marketing and Communications activities will sometimes drive traffic to the BenefitsCal site or the other service channels. It is important that for all Outreach campaigns, updates are provided to other contractors and stakeholders about anticipated change in traffic, and support materials are provided to answer any questions. As part of the BenefitsCal Marketing and Public Communications Plan, we will specify the notification process and the standard materials needed by other contractors and stakeholders.

We understand that we must support the counties in specific situations, like natural disasters or unanticipated events that may warrant swift action and communications. Our BenefitsCal marketing and public relations team will oversee, plan, and manage these circumstances and provide clear tactical recommendations to the Consortium before carrying out marketing, communications, and user service functions. Our marketing and public communications approach in working with other M&O contractors will align to the Consortium values and will be clear to facilitate the understanding of the counties, State agencies, and the public representing stakeholder groups, including our advocate community. We will show how we intend to unify our organizations to show a One Team stance on sensitive circumstances.

Accenture will share the BenefitsCal Marketing and Public Communications Plan with the other CalSAWS contractors. As changes are made in the other CalSAWS systems, we will work with the other contractors to draft and publish communications to the BenefitsCal user community regarding the impact of the change. We will provide the Consortium and other contractors with marketing campaign reports on marketing initiatives.



**Our Marketing and Communications collaboration approach brings value to:**

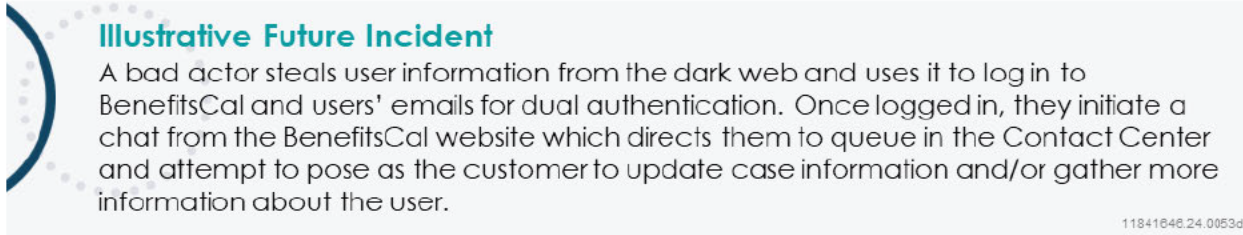
- **Users:** Clear messages regarding updates, education and coaching, especially those that require collaboration with multiple CalSAWS contractors.
- **Counties:** Increased county inclusion and involvement in the UCD process and user experience.
- **Consortium:** Guidance and tactical direction to ensure messages are well received.
- **Advocates, CBOs, and State Partners:** Increased awareness and inclusivity to current BenefitsCal status, issues, and updates.

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#### 4.1.3.2.2.6 Illustration of our production operations security approach

Overall system health and performance are crucial to providing a great experience to the users, and the integration with other CalSAWS applications can impact county operations. Bad actors exist now, and they will exist in the future. If bad actors strike again on BenefitsCal, in Figure 4.1-5. we share our approach to working with all impacted parties and how we collaborate with other CalSAWS contractors to implement security response and remediation strategies at the Consortium's direction. Functionality depicted in the scenario below may not exist today but illustrates Accenture innovative thinking aligning with BenefitsCal vision.

The graphic features a light blue background with a decorative circular pattern of dots on the left. The title "Illustrative Future Incident" is in a bold, teal font. The text describes a security scenario involving a bad actor using stolen information to access BenefitsCal and attempt to impersonate a user. A small alphanumeric code is visible in the bottom right corner of the graphic.

**Illustrative Future Incident**

A bad actor steals user information from the dark web and uses it to log in to BenefitsCal and users' emails for dual authentication. Once logged in, they initiate a chat from the BenefitsCal website which directs them to queue in the Contact Center and attempt to pose as the customer to update case information and/or gather more information about the user.

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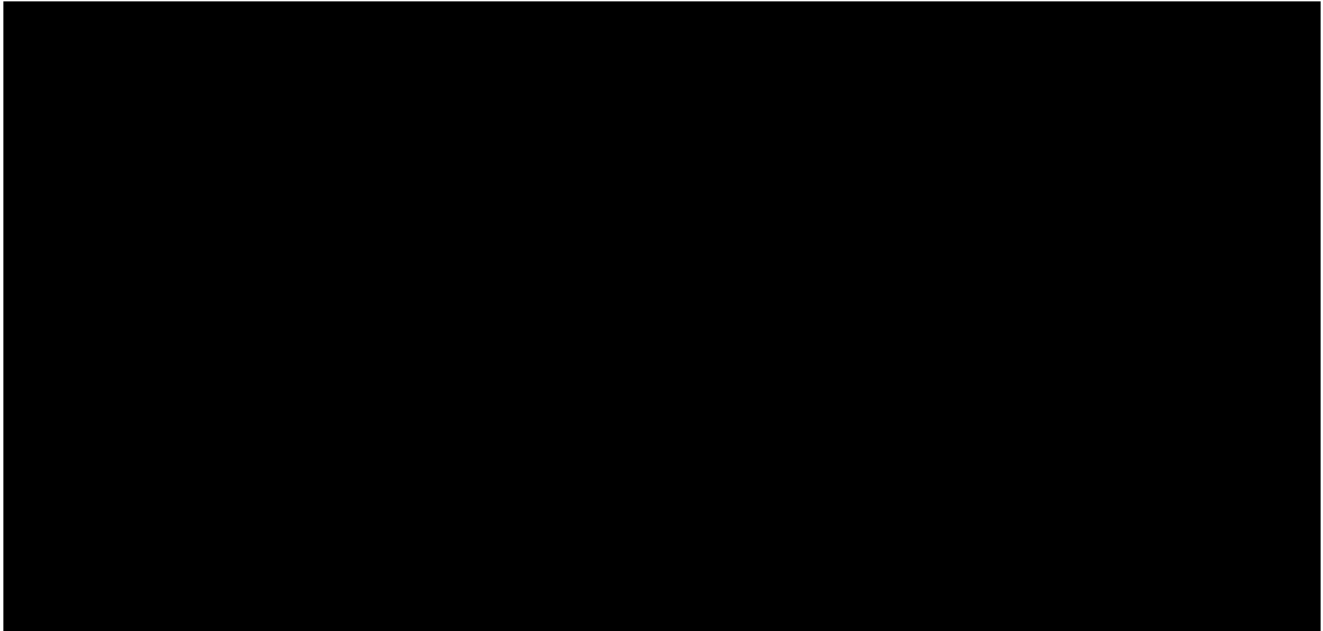
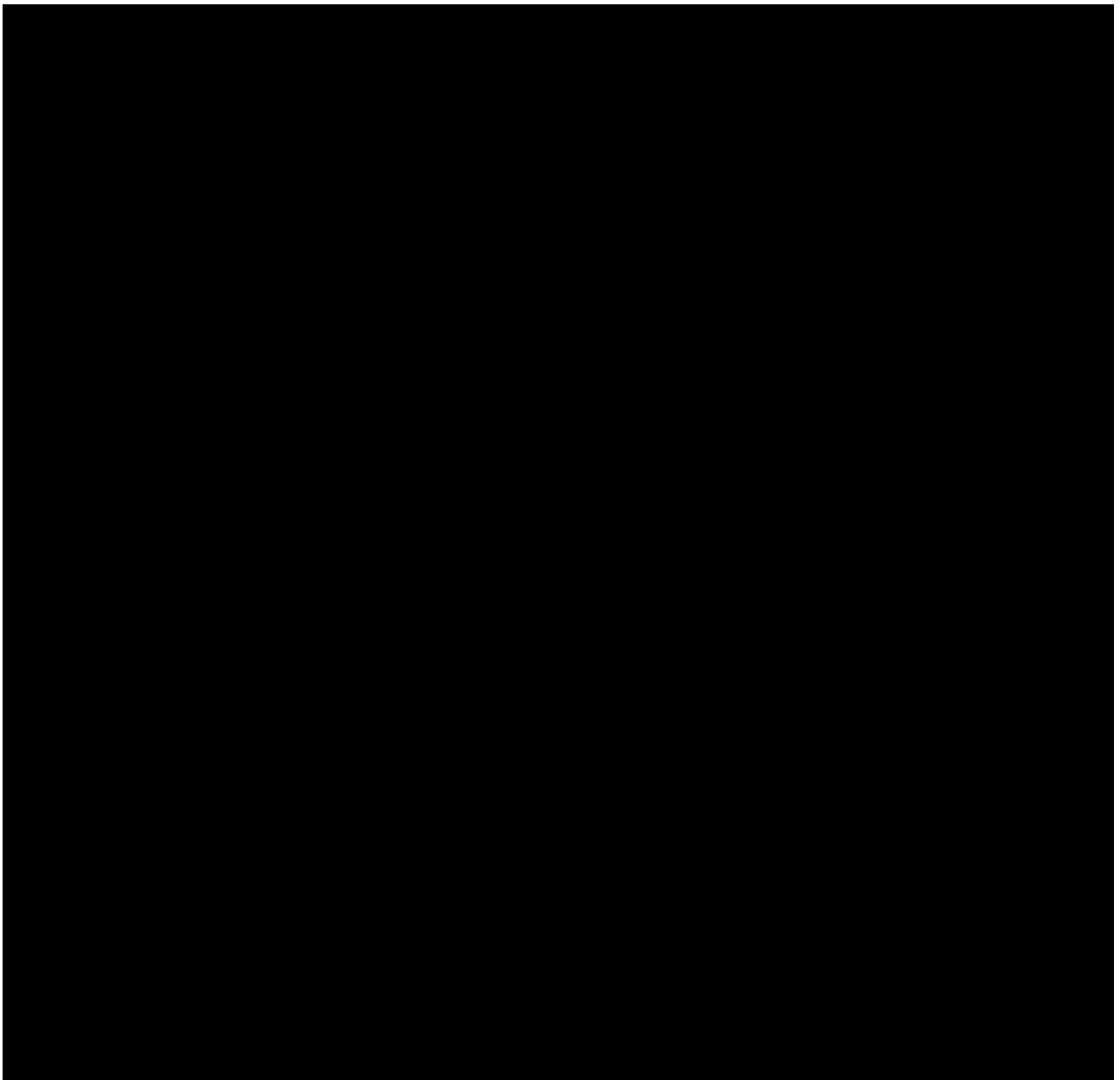
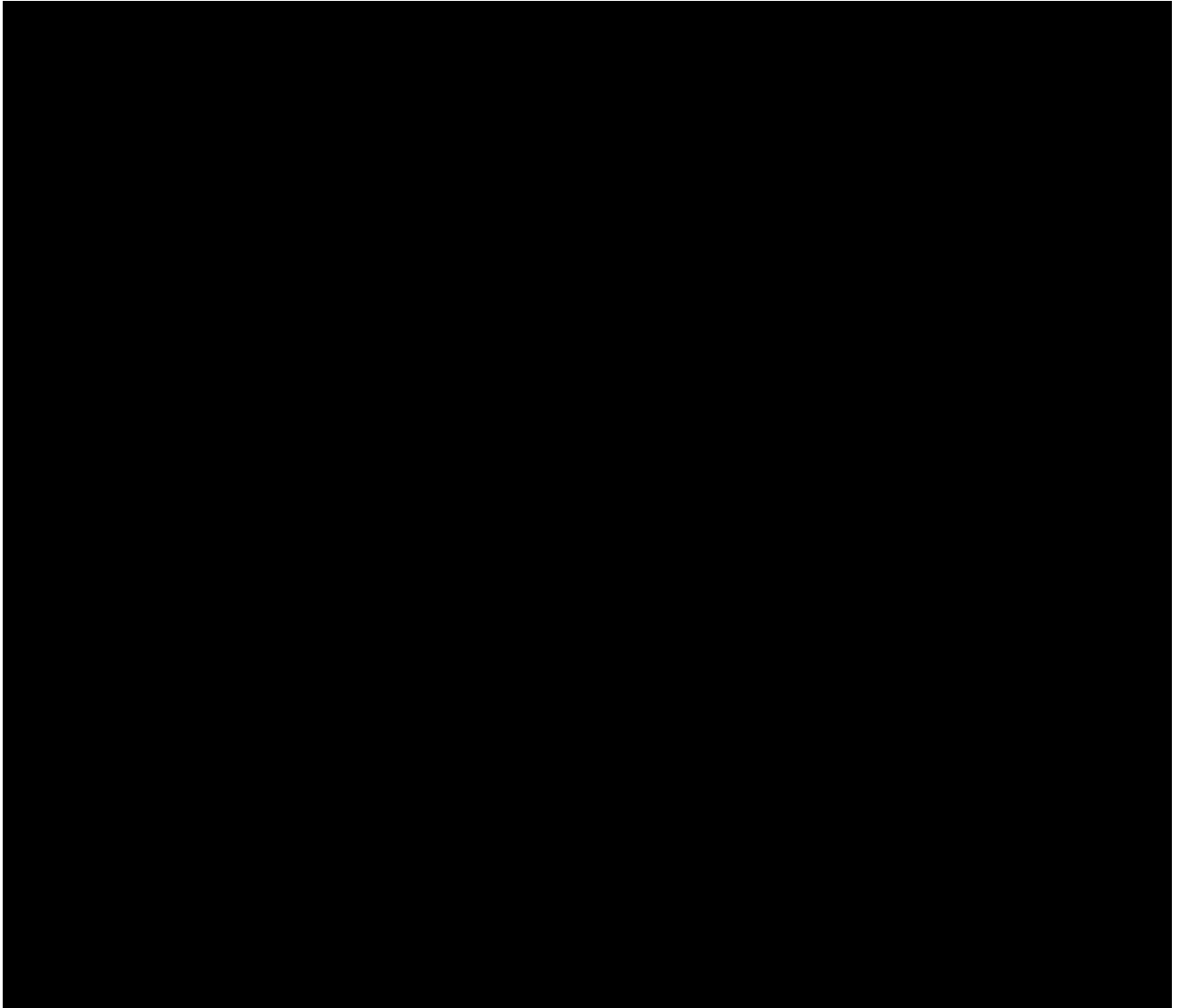
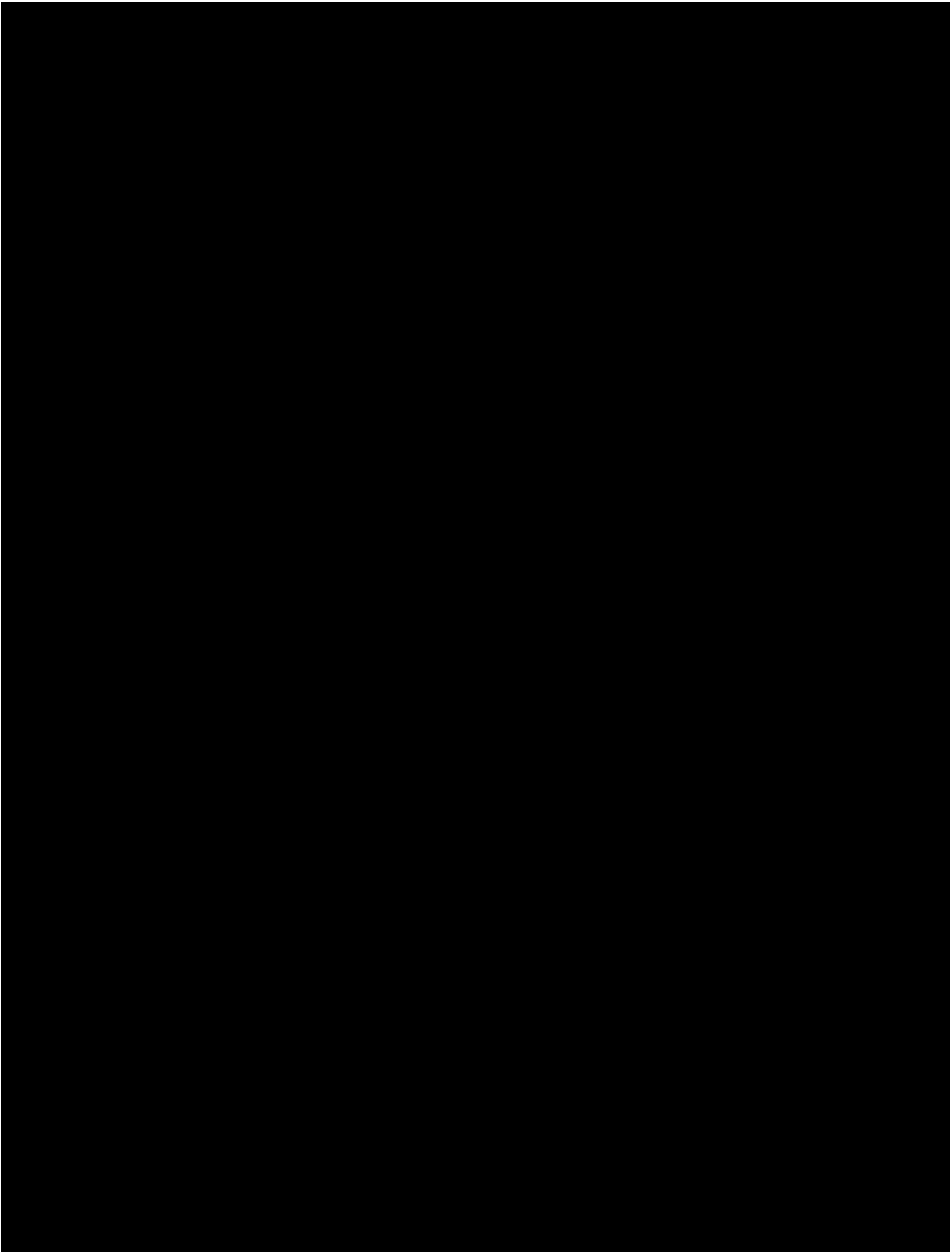
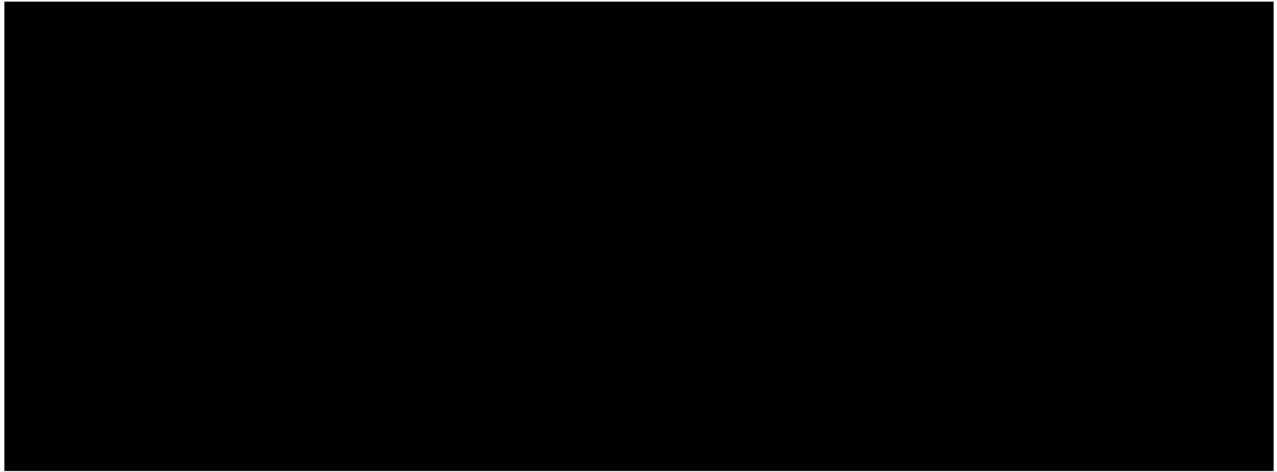


Figure 4.1-5. Closely monitoring and collaboration with the State security architect, we enable proactive security measures and prompt responses to mitigate risks.









### Key highlights of our approach

<b>Common focus on security</b>	<ul style="list-style-type: none"><li>• Strengthen BenefitsCal's security posture by working with our partner M&amp;O contractors for other integrated applications.</li></ul>
<b>Swift remediation</b>	<ul style="list-style-type: none"><li>• Bring the best minds from all contractors to jointly discuss solutions to problems and then determine owners to quickly resolve the agreed-upon solution.</li></ul>
<b>Continuous improvement and optimization</b>	<ul style="list-style-type: none"><li>• With a relentless focus on continuously improving the overall user experience, we collaborate with CalSAWS Infrastructure and M&amp;E contractors, Consortium to identify and implement improvement opportunities on a regular cadence.</li></ul>

### Key deliverables

- BenefitsCal System Security Plan
- BenefitsCal Technology Recovery Plan
- Performance Test Materials Packet

### Alignment to the Consortium's vision

- Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.
- Working cooperatively for benefit of entire CalSAWS.
- Establishing and sustaining cooperative relationships with CalSAWS contractors.
- Support ongoing refinement of DI processes and procedures.



## 4.2 – Understanding and approach to software development

### 4.2.1 Understanding and approach overview

BenefitsCal serves as the access point for residents of California seeking to apply for, view, and renew benefits for health coverage, food, and cash assistance. Though residents are the end users of the portal, we know that others are impacted by the design, like county eligibility workers, who depend on accurate data from BenefitsCal to process information correctly and deliver services efficiently. Design decisions on the front end must take into consideration downstream processing impacts to ensure that we don't create additional burden on county workers and delays in administering benefits. Ultimately, an excellent experience for a user on the front end that leads to administrative burden on counties and delays in receiving benefits, creates a bad experience overall for users and county workers alike.

We propose enhancements to the user-centered design (UCD) process that will design in consideration of, and with input from, all stakeholders to confirm that residents and stakeholders alike have the best possible experience—from the start of application through receipt and renewal of benefits. This is how we create a truly inclusive user-centered design that focuses on outcomes when making changes to BenefitsCal.

BenefitsCal grants access to client information for use in all stages of a user's journey to getting the aid they need. Securing this data is crucial to protecting the clients and establishing trust in the portal. BenefitsCal must be diligently protected from both the threats we are aware of as well as those that will emerge during the duration of this contract.

UCD, including generative research, evaluative research, co-creative design processes, and integration with hybrid-Agile development teams, enables meaningful transformation of experiences and services for users, county workers, and other program stakeholders. We believe that UCD is most successful when engaging all roles involved in the delivery of services rather than only focusing on the users of a digital product experience (in this case, residents). Ours is an anthropological approach to understanding the challenges and unmet needs of users, staff, and stakeholders alike so that services and experiences are delivered seamlessly with functions that manifest in the front end and the back end of complex technology systems. We seek to directly understand behaviors, motivations, needs, and challenges by gathering data—both qualitative and quantitative—at each step of the software development lifecycle.

UCD and development cannot occur in silos. Our design process delivers usable design artifacts for easy interpretation by developers, prioritization of product backlogs is informed by UCD findings, and ongoing measurement ensures that we've met our objectives once a new design is deployed.

Additionally, UCD leverages cross-disciplinary processes so that enhancements are designed in a way that aligns with constraints that provide system security, privacy, stability, and extensibility for both residents and staff.

Security forms the foundation of a successful experience. Our approach to strengthening security measures within BenefitsCal starts at the earliest stages of system change planning. We believe that a focus on security aspects during design along with additional checkpoints throughout the Build and Test phases of the SDLC will reduce risk of external threats to the BenefitsCal portal.

## 4.2.2 UA3

Describe how you will improve the existing BenefitsCal approach to UCD and the overall User experience as part of the SDLC.

### 4.2.2.1 Understanding



Accenture is the world's largest collection of designers and makers. Together, using user-centered design, we deliver design and technology solutions at scale. We have 62 creative studios, with over [REDACTED] creative professionals worldwide. We work with clients across all industries, including life sciences, retail, banking, automotive, technology, and more.

We have recently applied UCD methods like these to transform similar resident portal experiences in the State of Ohio, Connecticut, and New Mexico. We also have deep experience applying similar methodologies with other clients in the State of California, including the Department of Public Health, the California State Teachers Retirement System, and the California Department of Parks and Recreation.

We are proud to propose **Kendrick Lim** as our UCD Lead with 30 years of experience designing complex products and services across a variety of industries.



Based on our deep and broad experience, our approach to UCD takes a holistic view, to create transformational improvements to the services we provide to residents, stakeholders, and county workers. It builds upon your previous model, that more exclusively focused on improvements to the design of user-interfaces with less consideration to the downstream impacts that may slow the overall benefits process.

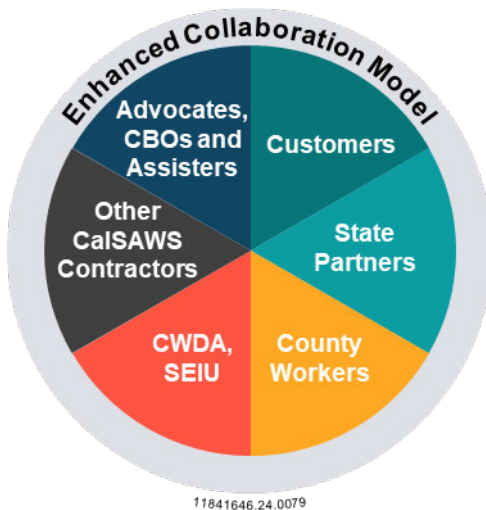


Figure 4.2-1. The Collaborative Model draws input from all stakeholders.

Our holistic approach can only be achieved with close collaboration from residents, the advocacy groups, and CBOs who directly support them; the State Partners who provide policy guidance; and county workers and the organizations that represent them. Your existing Collaboration Model forms the foundation – but we will expand that model even further. We pay particular attention to county eligibility workers whose ability to process applications is inextricably linked to front-end user experiences. We draw on the technical expertise of the M&E and Infrastructure contractors – to make sure that designs acknowledge the technical constraints of the backend system. Figure 4.2-1 depicts all of the critical stakeholders involved in the Collaboration Model. Each will be engaged at strategic moments throughout the process.

Submitting an application or renewing benefits is just the first step in the journey to granting or maintaining benefits for residents, so we think about how research and design impacts an end-to-end process for uptake and management of benefits. The recent experience of the time clock design underscores the importance of getting design input from users, counties, and other contractors. In the case of time clocks, lack of input led to a last-minute pull back of a design that was not technically feasible with current CalSAWS data, and not viable for county workers to maintain. By expanding both generative and evaluative research to include county workers and the other CalSAWS contractors sooner, we set the stage for the development of design solutions that are feasible and viable from the start, that meet the needs of all roles involved in service delivery, and that will lead to better outcomes for Californians.

We recognize that BenefitsCal serves a diverse population, and we aim to promote equitable access to benefits, with a focus on serving hard-to-reach populations, non-English speakers, and/or those with unique accessibility needs. Our approach considers equity and inclusion throughout the process—to deliver benefits to those who need them most.

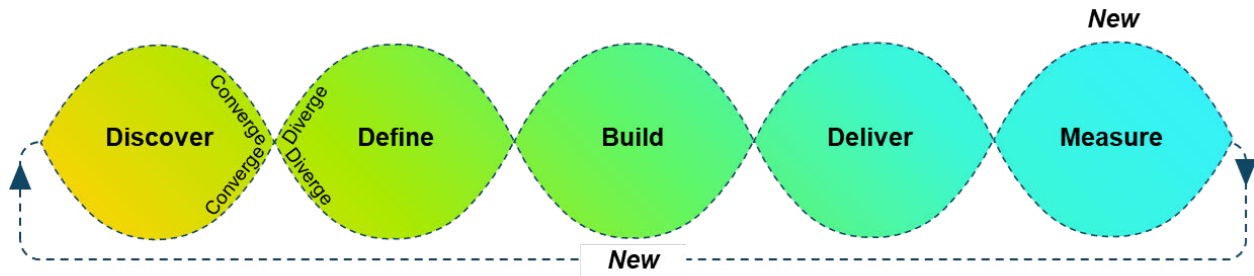
#### 4.2.2.2 Methodology

We will deploy our UCD approach that builds upon and enhances research, design, and measurement processes that are currently used by the BenefitsCal program. In Figure 4.2-2 we depict our proposed approach, and we go into detail about each phase in the following section.

Based on our deep experience in UCD and the feedback we've heard from BenefitsCal Stakeholders, there are two major changes we are proposing:

1. We add **a fifth stage** to the current four stage UCD Process. The proposed process includes Design, Define, Build, and Deliver—but adds a new stage, **Measure**. While measurement activities were included in some of the “deliver” activities in the current model, we believe that there are measurement activities that should extend beyond the prototype—all the way into deployment.

2. We create **a closed-loop** process. We understand that advocate groups and other stakeholders have sometimes complained that they don't know what happens after their design input is complete, and they aren't sure if the deployed designs are having the intended impact. We believe extending Measurement as a phase that connects all the way through the SDLC process will ensure that stakeholders are kept abreast throughout the process—advocate groups, counties, State partners, and other stakeholders. Additionally, we employ measurement strategies pre and post deployment, to ensure that the designs have the intended impact, and that we measure and optimize every improvement that is deployed.



Purpose				
<ul style="list-style-type: none"> <li>A generative, ethnographic approach to creating a deep understand of user challenges, preferences, and priorities</li> </ul>	<ul style="list-style-type: none"> <li>Synthesis of research to reveal key opportunity areas for improved user and county worker experience</li> </ul>	<ul style="list-style-type: none"> <li>Ideation and rapid prototyping to test solutions with users, county workers, and other stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Clear articulation of front-end and back-end experiences</li> <li>Engage stakeholders with clarity, in advance of launch, to avoid surprises</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing assessment of meaningful metrics against KPIs</li> <li>Measurement enables retrospective and forward-looking plan building</li> </ul>
What's New				
<ul style="list-style-type: none"> <li>Purposive Recruiting to ensure diverse perspective</li> <li>Leveraging input from Counties, Advocates, CBOs</li> <li>New qualitative research tools and methods</li> </ul>	<ul style="list-style-type: none"> <li>Creation of mindsets to better represent behavioral tendencies</li> <li>Leveraging AI for synthesis of qualitative data</li> </ul>	<ul style="list-style-type: none"> <li>High fidelity prototypes for rapid iteration</li> <li>Usability testing with users, county workers, and other stakeholders</li> <li>Accessibility Innovation</li> </ul>	<ul style="list-style-type: none"> <li>Deep integration across the development lifecycle</li> <li>Participation in hybrid-Agile ceremonies and activities</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing measurement of KPIs from Counties and Advocates</li> <li>Closed loop feedback into the Discover phase to refresh user understanding</li> </ul>

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Figure 4.2-2. Our recommended evolution of the UCD model offers additional input from counties and other stakeholders and creates a closed loop process for measurement and reporting.

The following sections detail the approach and tactics within each phase and highlight key experience and success that makes us confident in this approach for BenefitsCal.



#### 4.2.2.2.1 Discover

In the Discover phase, we use research and design methodologies to **uncover unmet needs and identify pain points** in service experiences.

**During the Transition-In phase** we will conduct the following activities:

- Research inventory and gap analysis:** We will work across the Collaboration Model and with the outgoing contractor to review the current UCD approach, personas, customer journeys and other artifacts, as well as historical research conducted. Based on that baseline, we will create a research plan to fill any gaps in the current state understanding with special consideration to diverse and hard to reach audiences, and work with the Consortium to prioritize against that plan.
- Customer Research:** Based on the gaps identified, we will conduct research which may include 1:1 interviews, observations, diary studies, site visits, and other methods.
- Stakeholder Mapping:** We will start with the existing Stakeholder Ecosystem Mapping and revise as necessary to reflect an accurate understanding of the residents and channels available through each stakeholder to reach target users (as relevant), and the right moments for input and consultation from each member of the stakeholder community throughout the UCD process. This will include Advocates, CBOs and Assisters, State Partners, county workers and the organizations that represent them, and other CalSAWS contractors. We will leverage the Stakeholder Map throughout the ongoing deployment of the UCD model and will update over time as stakeholder groups evolve, or new organizations are identified for the Collaboration Model.
- County Alignment:** We will pay special attention to counties in the stakeholder mapping process. As the primary interface for users, they hold valuable insights about user needs and pain points, as well as being a source of ideas about enhancements that are needed. They will be a key part of research planning. We also will build them in as an early validation step for all design concepts to make sure we are simplifying the end-to-end process, ensuring that design changes lead to more complete, accurate information and improve the overall experience of applying for and receiving a benefit.
- Measurement Approach:** While not part of the ongoing Discover process, during transition we will align on the core goals, objectives, and KPIs for the program. We will then evaluate the current measurement process to ensure that it is mapping to the agreed upon KPIs. Where necessary, we will recommend new measures and changes to measurement and the reporting approach to better serve stakeholders and drive data driven decision making.



These components will come together to form the foundation of the ongoing User Experience Process. It creates a backlog of user experience enhancements to be addressed in the UCD process once Transition-In is complete, and the foundation for future research and measurement. It will also be used to validate the participants and approach for the monthly UCD Meetings as well as to establish any parameters for ad hoc meetings.



All updates will be reflected in the **BenefitsCal User Centered Design and Customer Experience Report Plan** in month four of Transition-In, and on an ongoing basis as the process evolves and improves.

**Beyond Transition:** Because the needs of users and the context in which they are living changes, we must refresh our research regularly. Once transition is complete, we will continue to conduct **generative, ethnographic research** on an annual basis or as agreed upon with the Consortium. We use qualitative data to refresh our understanding of user needs and motivations. Based on our learnings in the Transition-In period, we will mobilize the Collaboration Model to effectively engage across the appropriate stakeholder groups as we conduct additional research.

We will deploy research tactics like the 1:1 interviews that you have traditionally used in the UCD approach, but also new strategies. Strategies may include:

- AI-enabled usability research tools, like WEVO, that allow you to access target users and tests more quickly than traditional usability testing approaches.
- Diary Studies, that build an understanding of experience over time and are especially useful in getting input from the people who support applicants, like Advocacy Groups, CBOs, or county workers
- Direct Observation often uncovers deeper insights about user challenges because we can see the workarounds and ecosystem challenges that users may have adapted to and don't even realize exist.

Whenever we conduct research with end users, we use a process of **purposive recruiting**. Purposive recruiting means research participants are intentionally screened so that we gather different points of view from specific and diverse populations. Understanding BenefitsCal commitment to equitable access to benefits, we look for diversity across several dimensions—socioeconomic, cultural, and geographical. We will align the recruiting strategy and apply precise screening criteria to ensure diverse participation to answer the research question at hand.

While focus group sessions will be used as complimentary data source, we find these to be less effective than some of the other strategies described, because louder voices may dominate the conversation.

#### The State of Ohio and Accenture

collaborated with three agencies, 14 food bank representatives, three Medicaid assisting organizations, two county offices, and nearly 500 residents to deliver a mobile-friendly, empathetic, Self-Service Portal (SSP) experience, infused with human-centered design (HCD).

Several research methods were used to gather input on key pain points from different stakeholder groups:

✓ **Using WEVO**, an AI-enabled usability research tool: We collected qualitative and quantitative input from 400 Ohio, Iowa, and Kansas residents.

✓ **Focus groups and diary studies** helped us build an understanding of the pain points in an organization's experience, as they assist residents in completing benefits applications.

✓ **Ohio county visits:** State and Accenture personnel observed applicants and conducted interviews to witness the experience of applying in person, seeing in-office interactions and applicants applying online.

The design team identified 132 product enhancements and 23 system improvements, with 50% already implemented. Insights from research helped build a more seamless and supportive experience.

Unlike the current UCD process that seeks insights from surveys in the Discover phase, we feel it can be challenging to understand the context of survey respondents during UX Research and Design phases, so we recommend leveraging survey tools later on, during evaluative phases, and as a part of ongoing measurement.

In all five phases of the UCD process, security will be a focus. In discovery, as we plan research topics and discussion guides, we will introduce concepts around privacy and security, such as understanding user attitudes and understanding of protections like multi-factor authentication.

#### 4.2.2.2 Define

In the Define phase, research from the Discover phase is synthesized, driving concept design and leading to creative opportunities for experience transformation.

Some of the key artifacts used in this phase include:

- **User Personas or Mindsets:** Given the diverse and ever-changing nature of BenefitsCal users, we will evaluate the current personas and determine if a refresh is appropriate, or if we'd be better served by the creation of Mindsets. Mindsets identify behavioral tendencies. We believe that mindsets, which articulate user behaviors and motivations, are more useful than personas or user segmentation, which are often structured around demographic attributes that don't necessarily relate to needs or challenges. Mindsets get to the core for why users make certain choices, and why they experience specific challenges, in a way that personas may not. We will ensure that our personas or mindsets reflect the diverse and multi-lingual audiences that BenefitsCal serves
- **Customer Journeys:** We will evaluate the existing customer journeys and based on the consolidated research and feedback from stakeholders will refresh as appropriate.
- **Service Blueprint:** Mindsets and journeys can then inform the creation of a service blueprint, which maps the end-to-end process for users and county employees, as well as the backend systems that are supported by other CalSAWS contractors – from the moment they first arrive on BenefitsCal until they receive their benefit, through the renewal process and any steps along the way. By mapping the way the experience connects between the front end (BenefitsCal) and the backend (county workers and backend systems), we can prioritize the problem areas that will have the greatest impact for improving experience for both users and county workers. We also work with State Partners to ensure policy dependencies are considered and fully documented in the future experience.

Again, security will be a focus. In the Define phase, security features and constraints will inform future-state service blueprints, relating to users' experiences as well as back-of-stage processes and mechanisms for systems integration. This gives us the right constraints and considerations to design to as we move into the Build phase.



#### 4.2.2.2.3 Build

In the Build phase, we transition from problem definition and concept generation to design prototyping and usability testing. This means that we pivot from creating artifacts that generate new experience concepts, to creating **interactive prototypes** that can be evaluated and refined. We rapidly prototype new designs interactively and with high-fidelity so that concepts can be tested with users and stakeholders.

Our process for creating high-fidelity design prototypes leverages bleeding-edge technology so that we can create meaningful variations in a short amount of time while staying faithful to established and mature design systems and corresponding component libraries. This may include iterations based on feedback or A/B testing.

In addition to getting feedback on these prototypes from users, we also engage with county workers to participate in the tests early, to avoid the unintended consequences of design decisions that could affect back-office processes. In the Build phase, we are always keen to work within technical constraints, and of course will consult with security experts so that experience concepts never introduce unsafe or risky processes to the system.

The Build phase leverages purposive research participant recruiting just like the Discovery phase. It is critical that we continue to gather diverse perspectives in favor of creating design solutions that are inclusive for diverse populations statewide. We also advocate for building trust and partnerships with key CBOs and advocacy groups by partnering on usability testing. In this way, we are directed to individuals who will offer the most insight while joining forces transparently with key partner organizations—creating buy-in and increasing awareness and adoption.

Accenture is deeply committed to accessibility, and our designers are trained in 508 and ADA Standards for Accessibility. All designs will meet 508 and ADA requirements. Additionally, our team will have access to the Accenture Accessibility Center, based in the San Francisco Innovation Hub, where we will be able to access emerging assistive devices and technology so we can propose innovations in accessibility beyond the required standards. We are committed to effectively designing for those users that have unique accessibility needs.

As ideas become reality in build, we review every design with security in mind – reviewing enhancements to make sure that no unnecessary PII is being requested, stored, or displayed.

#### 4.2.2.2.4 Deliver

For UCD, the Deliver phase is all about design supporting development teams with perfect screens, annotated interactions, inclusive and accessible content, and all details required to implement and release portal improvements in a smooth and efficient manner. Our proposed Deliver phase is all about making design concepts real. It is where design is in the closest group effort with technical counterparts that drive implementation of the software development lifecycle (SDLC). Because our User-Centered Design Lead is part of the Application Development team, we are always in lock step with the BenefitsCal development process – working within the hybrid agile process and providing feedback during all agile ceremonies. We go into more detail on the alignment with SDLC in Section 4.2.3.2.6.

We understand that some of the enhancements of BenefitsCal will impact the M&E and Infrastructure contractors. We will coordinate with those contractors to include level of effort in our implementation plan. We are always sensitive to the limited resources available and the capacity constraints of the various contractors and will work through the prioritization and agile planning process to ensure successful collaboration.

As enhancements are developed, we coordinate user acceptance testing to make sure that designs have been implemented to the expectations of users, county workers, and other stakeholders. We will coordinate test environments and testing schedules with the other CalSAWS contractors and through the integrated SDLC process.

#### 4.2.2.2.5 Measure

We propose adding a fifth phase to the current UCD process that is focused on measurement and creates a closed loop back to the Discover phase. Through measurement, we are able to objectively evaluate the success of our enhancements, and identify any new pain points, challenges, and opportunities emerging.

Measurement strategies include tactics that have historically been a part of your UCD process, like web analytics, always on surveys, and social media monitoring. However, we add additional analytics capabilities and expand the data sources and reporting. Additionally, your previous UCD model had more limited feedback from users, counties, and other stakeholders beyond the implementation planning stage. We propose expanding that input to get more qualitative feedback from stakeholders on how enhancements are being received. Tactics will include:

- **Web Analytics** offer insights into common behaviors on BenefitsCal and can be used to uncover usability issues and identify popular content to inform future designs. Web analytics may include trend analysis, A/B testing, and session replay.
- **Surveys** will be used to understand the success of enhancement releases and to get additional insights into user preferences and challenges. Survey techniques will include always-on-surveys, targeted intercepts, and email surveys.
- **Social Media Monitoring** is a valuable tool for understanding public perception and can provide early indication of emerging issues or opportunities.
- **County Worker Feedback:** We know that the enhancements on BenefitsCal can impact the workload for county workers and we will have included them in the design. During Transition-In, we will establish key metrics from county workers around workload and user questions and a reporting cadence so we can see how the experience on BenefitsCal is influencing the end-to-end experience for users and county workers. With each enhancement, we will establish appropriate KPIs to include in the post-release measurement strategy.
- **Advocate Group and CBO Feedback:** CBOs, assisters, and Advocate groups regularly interact with the most vulnerable users of BenefitsCal. During Transition-In we will establish the right mechanisms for collecting regular feedback from these groups to include in our ongoing measurement process, and as part of specific enhancements we will establish KPIs to include in the post-release measurement strategy.



We engage stakeholders throughout the post launch evaluation and feedback primarily because it provides more complete measures of success, but it has the added benefit of providing more transparency and buy in.

Transparency builds trust and improves perceptions. We provide a dashboard and metrics readouts to all stakeholders, advocates, CBOs, counties, State partners, and other stakeholders at a regular cadence as agreed to in the BenefitsCal User Centered Design and Customer Experience Report Plan.

#### 4.2.2.2.6 A Hybrid-Agile approach to the SDLC

As pictured in Figure 4.2-3, our UCD Process provides the foundation for stakeholder engagement throughout the SDLC.

The Discover and Define phases are critical parts of the inputs and assessment that make up the prioritized backlog. They occur in advance of the development cycles, so that research insights, and low-fidelity design concepts, can be reviewed, tested, and refined, before designers integrate with and support development teams in Build, Deliver, and Measure phases.

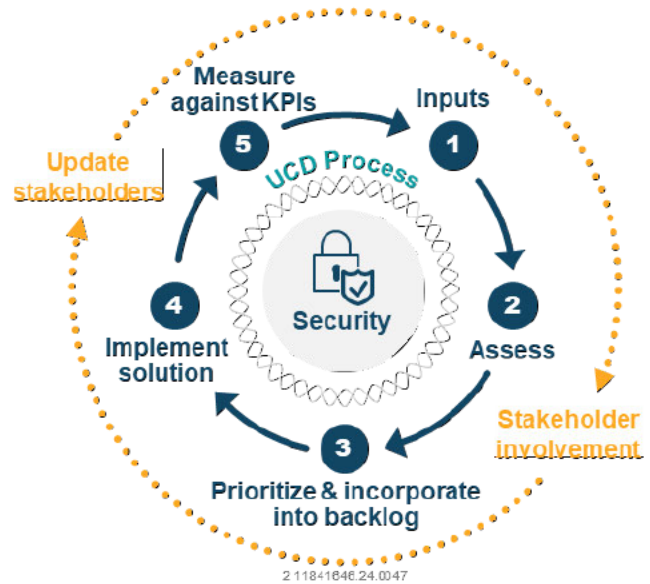


Figure 4.2-3. Our UCD Process forms the foundation of the SDLC

All of these phases, their respective activities and deliverables, and the manner in which they integrate with the SDLC, should be periodically reviewed. We will explicitly seek feedback from program stakeholders and other contractors, not only on deliverables, but also on process. We seek to continually optimize the way that we work, adjusting to the requirements of context, and folding in learnings and best practices. Once delivered, engagement and usability metrics will be provided to the UCD group, and a discussion will take place to gather feedback on the effectiveness of the change. Responses will be factored into possible future changes to fine tune the approach as needed.

Table 4.2-1 provides details how UCD is a critical part of the core SDLC activities.

Activities	Outputs
<b>Program increment planning</b>	UCD activities in Discover and Define phases occur in advance of increment planning. This reoccurring meeting is used to revisit and adjust priorities as needed and can only be productive if new design concepts have been elaborated, reviewed by stakeholders and technical partners, and adjusted so that they fit into a development cycle. Increment planning sets the expectations and goals for the upcoming set of sprints through the collaboration of the product owners, SMEs, and Scrum teams. Each Scrum team will subsequently break the feature apart with the support of designers into the necessary user stories to deliver the prioritized features that adhere to design intentions, including interaction patterns and content.



Activities	Outputs
<b>Backlog refinement</b>	Definition of baseline epics, features, user stories, and acceptance criteria is supported by UCD so that no design is misinterpreted, and all intentions are clear. The goal is designer, developer, and stakeholder consensus on backlog items.
<b>Sprint planning</b>	<ul style="list-style-type: none"> <li>Estimate and assign out prioritized user stories in the product backlog</li> <li>Define the sprint scope</li> <li>Confirm understanding of user stories and their acceptance criteria</li> </ul> <p>A user story is an informal, general explanation of a software feature written from the perspective of the user. Inclusion of individuals from the UCD team in sprint planning continues to ensure that there is perfect alignment and understanding between design intention and development.</p>
<b>Daily stand-up</b>	Daily team synchronization that provides insights into the team's progress and identify any blockers or issues that require attention. Designers typically support stand-up by answering questions that developer have about hi-fidelity designs.
<b>Scrum of scrums</b>	Cross-team synchronization and cooperation on a frequent basis. This includes representatives from each Scrum team (i.e., ScrumMaster, product owner), and project management, architecture and security, and design. This is used to identify any blockers or issues that require attention. The UCD Lead attends scrum of scrums to deeply understand the impact and influence of UCD activities on the work of other groups.
<b>Design sprint activities</b>	Designers create wireframes, UI components, and high-fidelity mockups. They participate in Final User Acceptance and Usability Testing.
<b>Development sprint activities</b>	Developers create components that are locally tested and deployed to an environment. Testers validate stories against acceptance criteria. Designers support development with refinement and annotation of high-fidelity mockups.
<b>Supporting metrics/tools</b>	Burn-down charts will be produced over the course of the sprint to provide insights into the team's progress.
<b>Sprint demo</b>	Demonstration of what was completed in the sprint. Designers participate to ensure development meets the intention of high-fidelity prototypes and mockups. The Product owner indicates if the story meets the definition of done and accepts or rejects the story. Feedback is provided to inform backlog updates.
<b>Sprint retro</b>	Identify what went well and learn how to improve on the team's group effort.
<b>Release checkpoint</b>	If the product owners indicate at the end of the sprint that a feature is ready to be passed, the completed feature will be available for user acceptance testing (UAT) and beta testing. The product owners and technical architect will also determine which release the feature should target.
<b>Supporting metrics/tools</b>	Burn-up charts and velocity will be reviewed at the end of each sprint. The burn-up chart will provide visibility into the work remaining to complete a feature. Velocity provides insights into the average number of stories that the Scrum team is completing in a sprint. This can be used for future estimating.

Table 4.2-1. Detailed breakdown of SDLC activities and output alignment with UCD

We propose a hybrid-Agile methodology with lean design that fits with and evolves the BenefitsCal design process. Our design and development teams will operate together in a cyclical process. Our methodology is iterative, flexible, collective, and user centric. It

incorporates stakeholders throughout the process to realize the BenefitsCal Portal unification and modernization, with seamless integrations to CalSAWS systems. Figure 4.2-4 outlines the benefits of integrating with a hybrid-Agile approach for BenefitsCal and its clients.

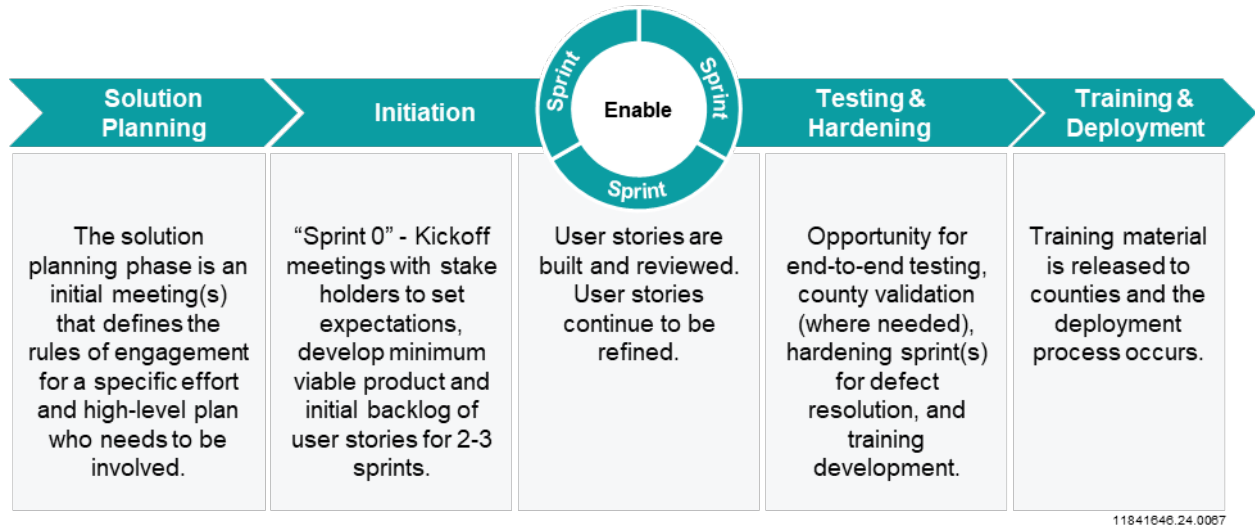


Figure 4.2-4. Our methodology provides discipline and flexibility for a high quality, reliable portal evolution.

**Testing and Hardening:** Our testing methods include the creation of test scripts in all phases, including unit, system, integration, and performance testing. From the UCD perspective, we will support the Consortium-led County Validation testing efforts as part of our deployment process. We anticipate that the additional engagement with counties more frequently in the design process will lead to a high success rate for validation testing. Our Test Manager will work with the UCD Lead to ensure that all testing, back end or front end, is executed efficiently and with proper communication with the Consortium and other CalSAWS contractors.

#### 4.2.2.2.7 Accelerating improvements to the overall user experience as part of the SDLC

To accelerate improvements to UX, and in parallel to the five-phase UCD process, we advocate for an evaluation of the current UX of BenefitsCal by conducting a heuristic analysis. Heuristic analysis is an industry standard method for identifying design problems in a user interface based upon best practices and specific user input. As determined in the research plan during transition, we will run a set of user testing sessions with the users, CBOs, and county workers, and then analyze the data demonstrating the user behavior on the website. Learnings will be compiled and prioritized with the key stakeholders and the Consortium based on their impact on processing timelines and users. Following the prioritization, our product teams will design, test, and develop the solutions sprint by sprint as described in our software development process.

To demonstrate our approach to identify and solve key issues, we conducted a rapid UX audit using Nielsen's 10 usability heuristics for user interface design (<https://www.nngroup.com/articles/ten-usability-heuristics/>). This assessment does not benefit from the input from other stakeholders and county workers which would likely impact our

recommendations. It does however provide an illustrative view of the kinds of improvements we believe should be considered and could significantly improve the user experience.

We assessed the application process for a medium complexity scenario: A primary user, applying for CalWORKs, CalFresh, and MediCal, is living with a significant other. They are not married. The primary user has a child who is a student, shown in Figure 4.2-5.

Below, there is a list of issues observed, organized into categorized under principles and our suggestions for how to fix them.

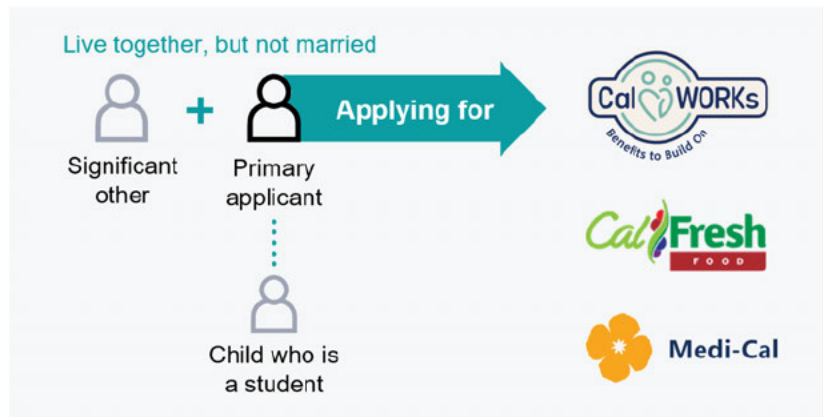


Figure 4.2-5. Sample user to illustrate heuristic analysis.

#### 4.2.2.2.7.1 Principle 1: Visibility of system status



**"The design should always keep users informed about what is going on, through appropriate feedback within a reasonable amount of time."**

—Nielsen

##### 4.2.2.2.7.1.1 Displaying progress during application

BenefitsCal does a good job breaking down the application into multiple steps and displaying the current step. However, for the user, how long a step will take to complete is an unknown. While we understand the number of questions in each section will change conditionally based on the user's answers, we can display a dynamic progress bar, as illustrated in Figure 4.2-6, to affirm the user and avoid abandoned applications.

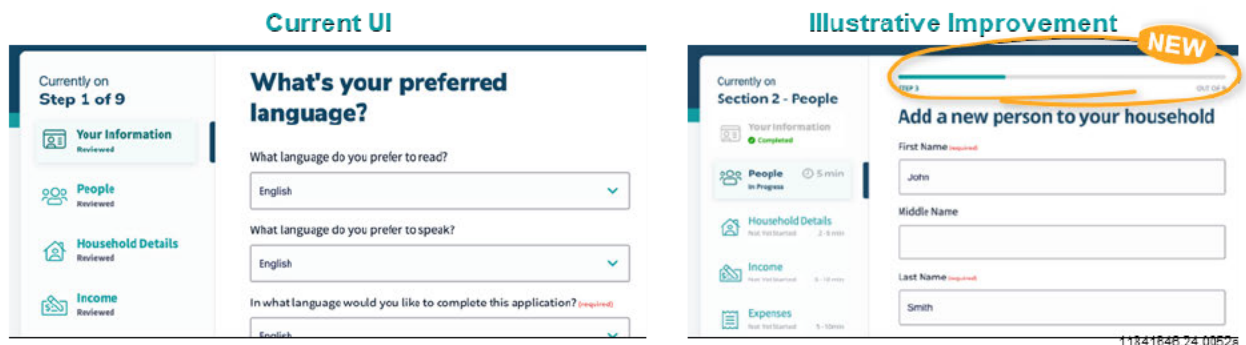
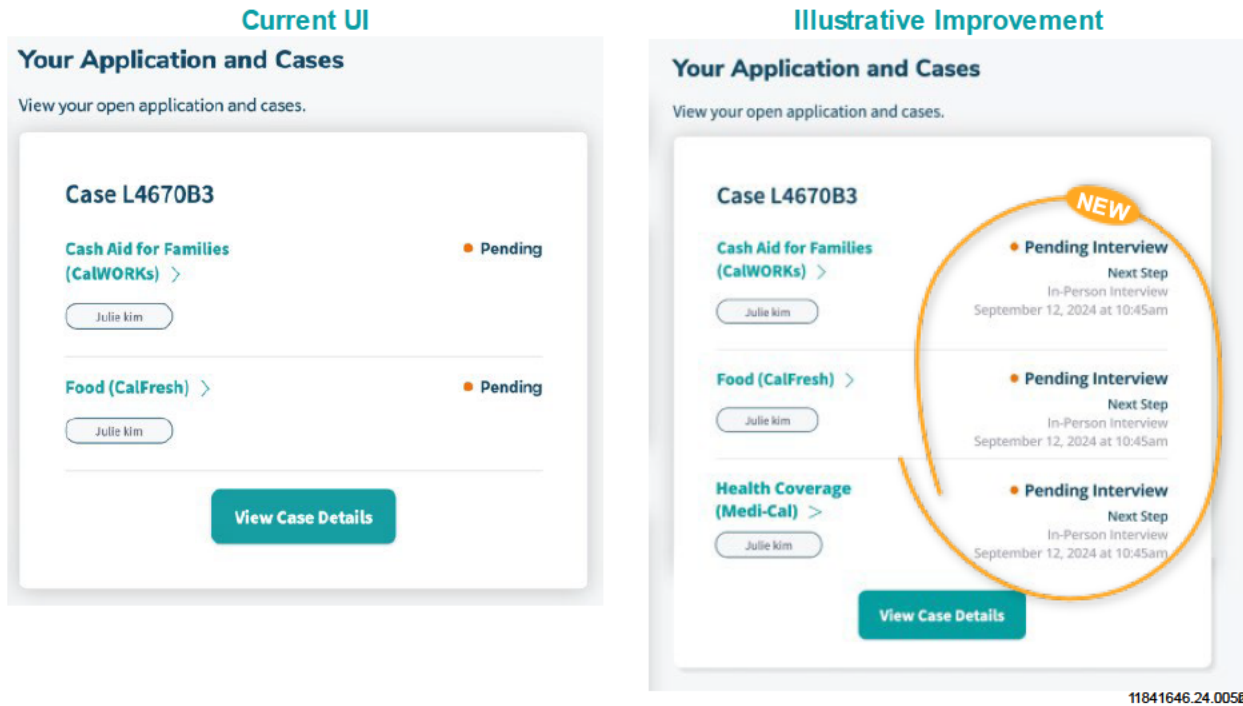


Figure 4.2-6. A status bar provides clarity for the user on where they are in a transaction.

#### 4.2.2.2.7.1.2 Application status

Users can see their applications on their account. In our scenario illustrated in Figure 4.2-7, our user has applied for three benefits, but only two of them are visible (with limited information).



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Figure 4.2-7. Bringing information up a level makes it easier for the user to find the desired information.

#### 4.2.2.2.7.2 Principle 2: Match between the system and the real world



**“The design should speak the users' language. Use words, phrases, and concepts familiar to the user, rather than internal jargon. Follow real-world conventions, making information appear in a natural and logical order.”**

— Nielsen

##### 4.2.2.2.7.2.1 Selecting benefits to apply early and confidently

Selecting which benefits to apply for does not occur until 11 clicks into the experience. We recommend testing a version where the system displays this question first, as illustrated in Figure 4.2-8, with sufficient details about the benefits for users to make selections.



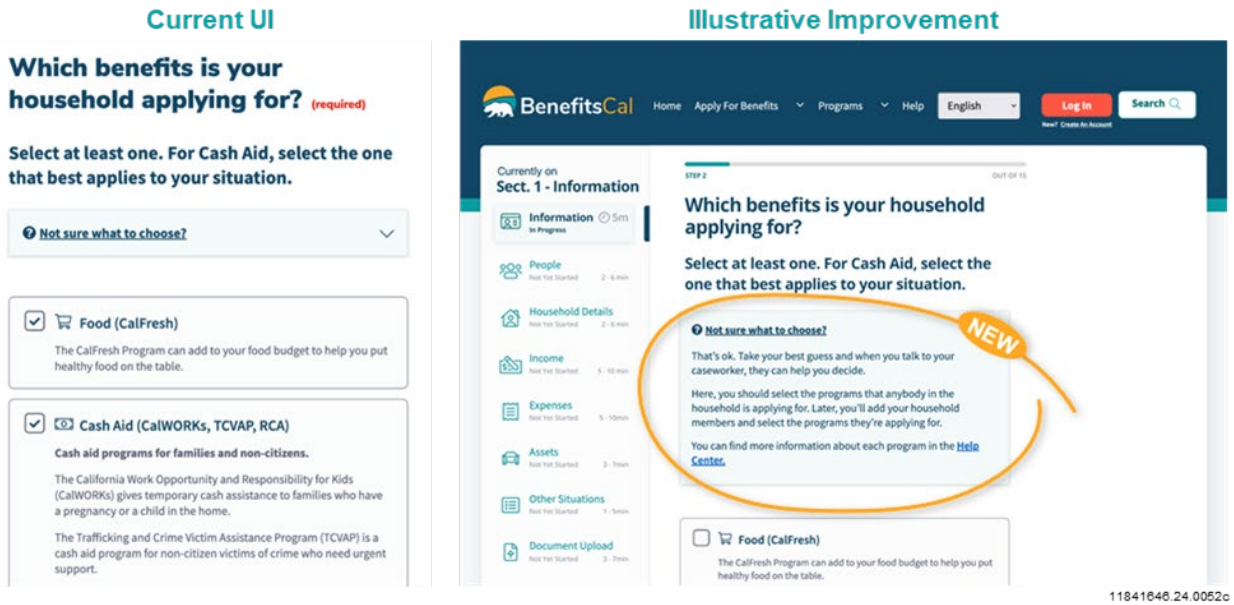


Figure 4.2-8. Rearranging the order of the questions to reduce the user's frustration.

#### 4.2.2.2.7.3 Principle 3: User control and freedom



**"Users often perform actions by mistake. They need a clearly marked 'emergency exit' to leave the unwanted action without having to go through an extended process."**

— Nielsen

##### 4.2.2.2.7.3.1 Inline edits

When a user needs to make changes to the information they entered, they need to go through the whole section. They should be able to easily edit individual data points, as illustrated in Figure 4.2-9.

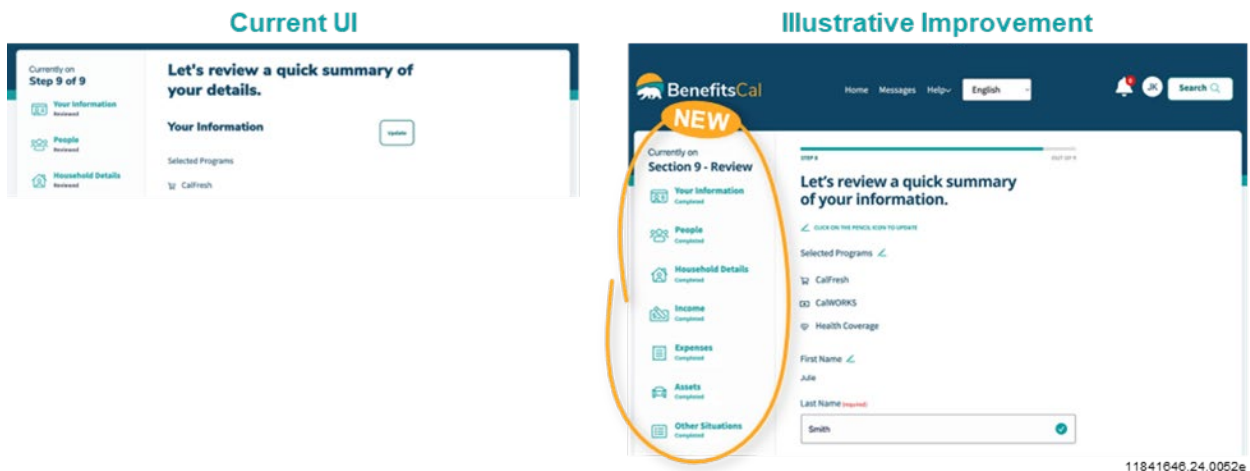


Figure 4.2-9. Making it easy for individuals to update specific data points will reduce burden on applicants.



#### 4.2.2.2.7.4 Principle 4: Consistency and standards



**“Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform and industry conventions.”**

— Nielsen

##### 4.2.2.2.7.4.1 Consistent information hierarchy and language

Throughout the application, titles and subtitles are used differently. On the left side of the screenshot in Figure 4.2-10, the title is a statement, and on the right, the title is a question. These types of minimal inconsistencies create mental fatigue and cause errors. The language and use of UI elements should be consistent.

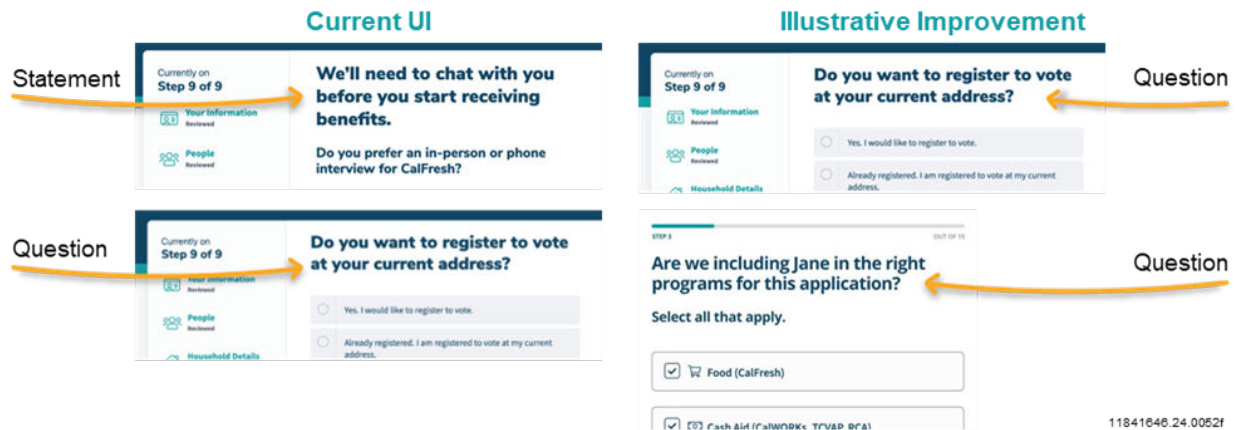


Figure 4.2-10. Displaying prompts in the same format helps with user understanding.

#### 4.2.2.2.7.5 Principle 5: Error prevention



**“Good error messages are important, but the best designs carefully prevent problems from occurring in the first place. Either eliminate error-prone conditions or check for them and present users with a confirmation option before they commit to the action.”**

— Nielsen

##### 4.2.2.2.7.5.1 Search with typos

Currently, the site search does not search with typos or suggest corrections. Instead, it returns no results. The search function should assist users with common typo corrections, as illustrated in Figure 4.2-11.

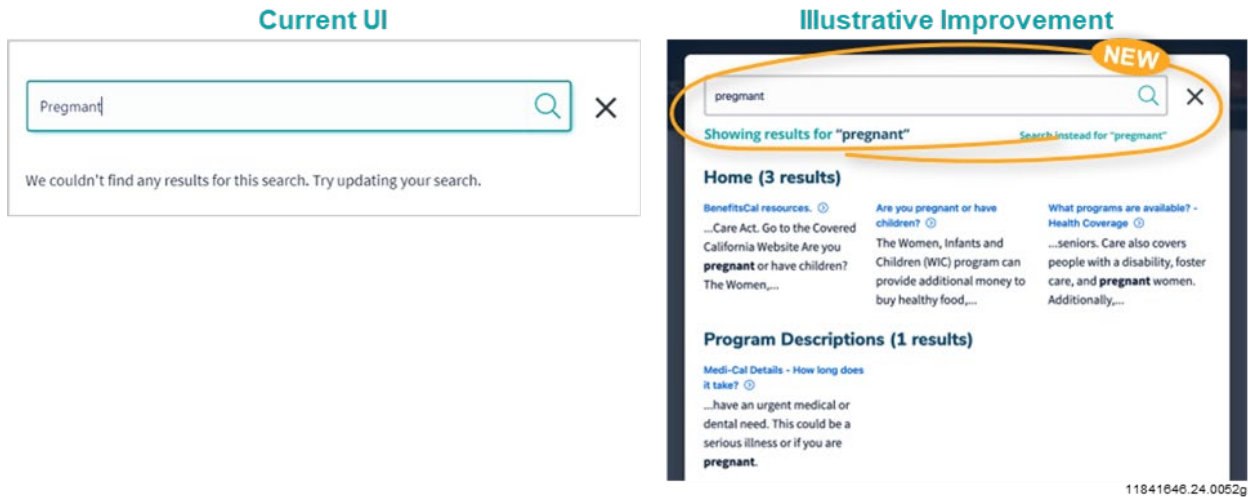


Figure 4.2-11. By allowing a search with alternative spellings, users will still reach the desired content even if they misspell the word.

#### 4.2.2.2.7.6 Principle 6: Recognition rather than recall



**“Minimize the user's memory load by making elements, actions, and options visible. The user should not have to remember information from one part of the interface to another. Information required to use the design (e.g. field labels or menu items) should be visible or easily retrievable when needed.”**

— Nielsen Is this benefit right for me?

To understand which benefits to choose, users need to navigate to the help center to better understand the benefits. The information should live where it is most relevant: near the benefit selection, as illustrated in Figure 4.2-12.

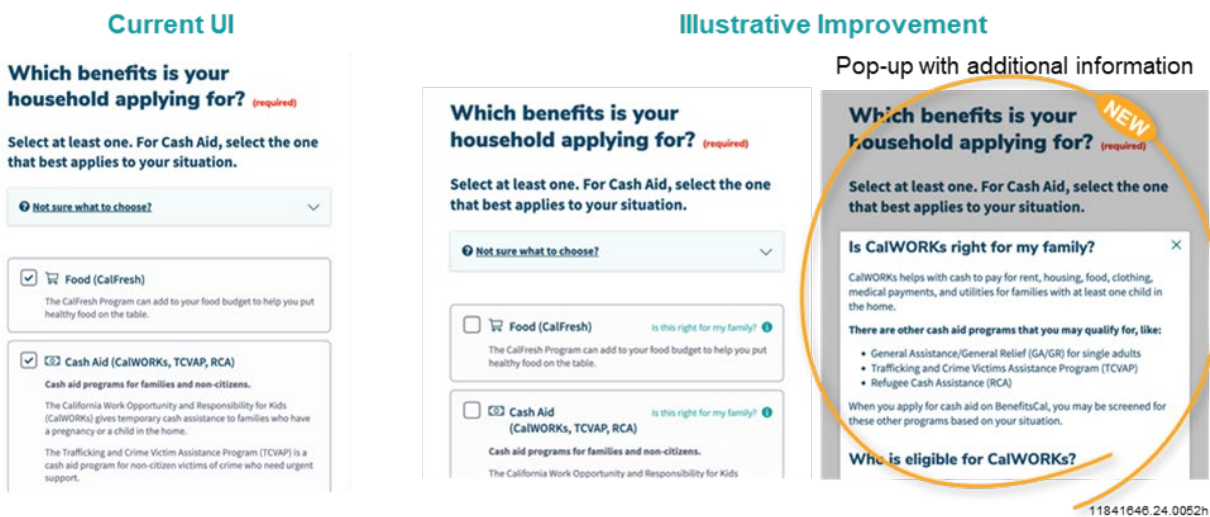


Figure 4.2-12. Bringing additional content to the user through a pop-up allows the user to maintain their progress while accessing the additional content.

#### 4.2.2.2.7.7 Principle 7: Flexibility and efficiency of use



**“Shortcuts, hidden from novice users, may speed up the interaction for the expert user so that the design can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.”**

— Nielsen

The UI should be designed to accommodate a range of user abilities and preferences. This allows users to set up their experience to align with their preferences. In our case, this principle is relevant for the users who are returning to renew their benefits.

##### 4.2.2.2.7.7.1 Simple “one-click” renewals

An optimized renewal process can help returning users to quickly submit their renewal applications leveraging the data we have about the users and a simplified process with the users who are more familiar with the systems. In Figure 4.2-13, we illustrate what a simple “one-click” renewal might look like for the user.

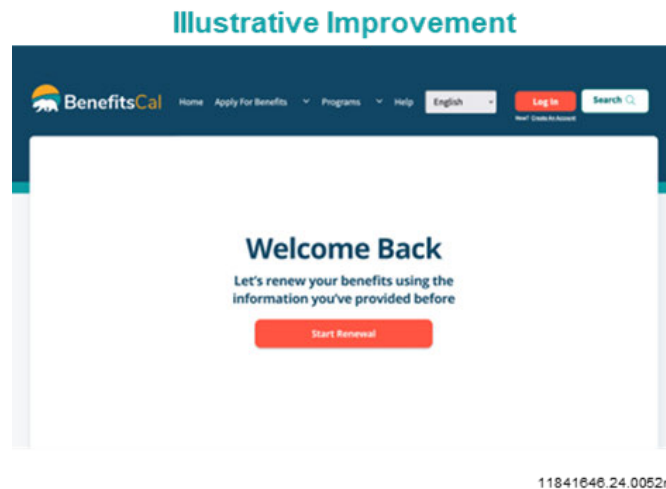


Figure 4.2-13. A simplified process to renew gives users quick access to make updates.

#### 4.2.2.2.7.8 Principle 8: Aesthetic and minimalist design



**“Interfaces should not contain information that is irrelevant or rarely needed. Every extra unit of information in an interface competes with the relevant units of information and diminishes their relative visibility.”**

— Nielsen

##### 4.2.2.2.7.8.1 Simplified sections and steps

The current process has nine steps and multiple questions within the steps, which makes the application more overwhelming. We would test an option and compare application abandonment rate with simplified sections: 1. Benefits, 2. You and your household, 3. Income and expenses, 4. Documents, 5. Review and submit, as illustrated in Figure 4.2-14.

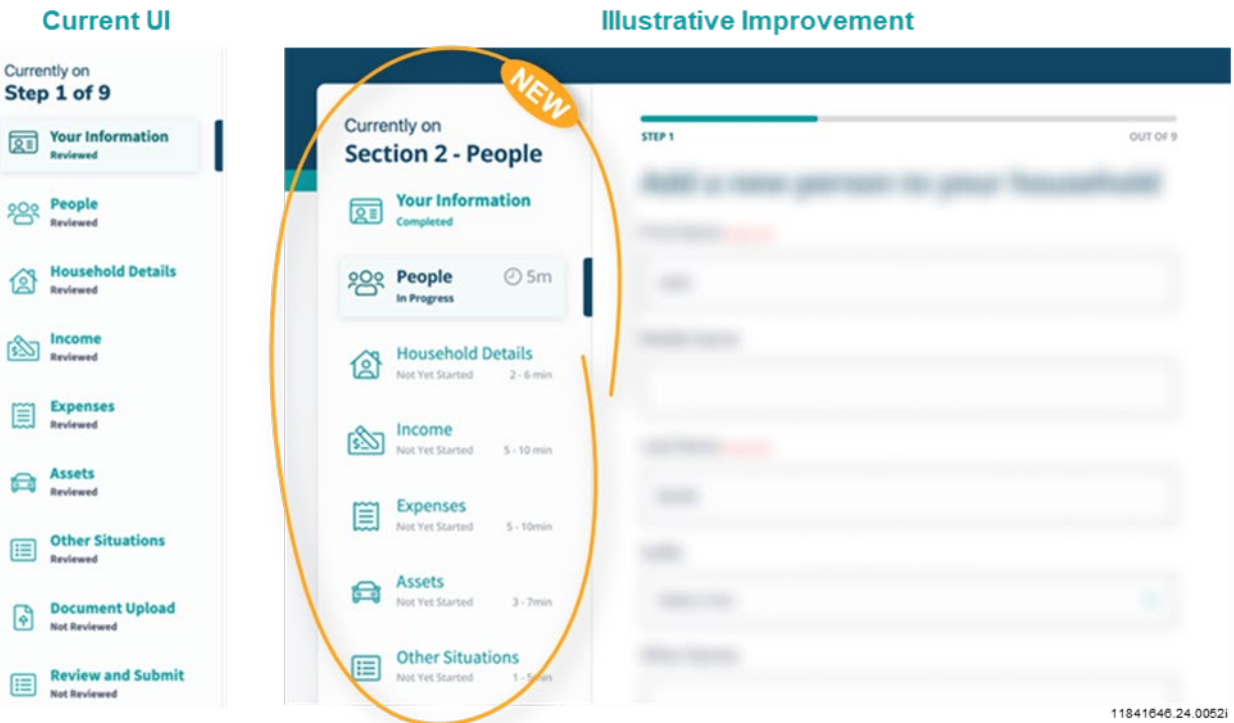


Figure 4.2-14. Navigation provides additional detail on the status for the user.

#### 4.2.2.2.7.9 Principle 9: Help users recognize, diagnose, and recover from errors



**“Error messages should be expressed in plain language (no error codes), precisely indicate the problem, and constructively suggest a solution.”**

— Nielsen

##### 4.2.2.2.7.9.1 Do you want to save your application?

In our test, when we tried to exit the application process by navigating to another page, the system did not warn us. As shown in Figure 4.2-15, we suggest adding a warning pop-up with an option to create an account to save the information when users exit the application.

**Illustrative Improvement**  
Pop-up prompt for user to create an account

**BenefitsCal**

Currently on  
**Sect. 1 - Information**

**Information** 5m  
In Progress

**People**  
Not Yet Started 2 - 6 min

**Household Details**  
Not Yet Started 2 - 6 min

**Income**  
Not Yet Started 5 - 10 min

**Expenses**  
Not Yet Started 5 - 10 min

**Assets**  
Not Yet Started 3 - 7 min

**Other Situations**  
Not Yet Started 1 - 5 min

**Document Upload**  
Not Yet Started 3 - 7 min

**Create an account to save the progress on your application.**

Who in my household should create an account?

What county do you live in? (required)  
Glenn

First Name (required)  
Jane

Last Name (required)  
Smith

Email (required)

This is the email you'll use to login to your BenefitsCal account.

Password (required)

It must include at least:  
X 8 characters

Log In Search

New? Create An Account

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Figure 4.2-15. Direct users to create an account before they lose their application information by accident.

#### 4.2.2.2.7.10 Principle 10: Help and documentation



**"It's best if the system doesn't need any additional explanation. However, it may be necessary to provide documentation to help users understand how to complete their tasks."**

— Nielsen

##### 4.2.2.2.7.10.1 Inline help

Throughout the application, users need to answer many questions for which they might need guidance. Some questions already have help text near them. We recommend adding help text on each field, as show in Figure 4.2-16. This is similar to what you find using TurboTax.



## Illustrative Improvement

**Who pays for gas, electric, or other fuel used for heating or cooling?** (required)

If you split this bill with household members, report what each person pays, one at a time.

What if someone else pays for heating or cooling? ⓘ

☒ Julie kim (27)

☐ John Smith (33)

☐ Jane Smith (25)

**Who pays for heating or cooling?**

Who pays for heating and cooling can depend on your living situation and lease agreement:

- 1. Included in Rent:** Sometimes, your landlord pays for heating and cooling, and it's included in your rent. This is common in apartment buildings.
- 2. You Pay:** In other cases, you have to pay for heating and cooling yourself. This is more common if you rent a house or a place with its own heating and cooling system.
- 3. Split Costs:** Sometimes, the landlord pays for maintaining the heating and cooling systems, and you pay for the energy used.
- 4. Living in a Shelter:** If you live in a government

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Figure 4.2-16. Additional text appears to assist the user in completing their application.

## 4.2.2.2.7.10.2 How-to videos

Currently, the how-to videos section links users to YouTube. A UX design best practice is to keep the user within a site, as shown in Figure 4.2-17, versus sending them to an external site. Impacts to performance would be evaluated during the design process.

**Current UI**  
Sends the user to YouTube for the video

How-to Videos

- Community Based Organizations (CBO)**  
Learn what Community Based Organizations can do on BenefitsCal. This includes how to submit applications, view reports, and manage staff accounts.
- Customer Dashboard Overview**  
Learn how you can use BenefitsCal to manage your benefits. This includes how to view your case details, applications, appointments, and helpful resources.
- How to Apply for Benefits**  
Learn how to submit an application for food, cash, and health coverage benefits.

**Illustrative Improvement**  
Video is within the page

Currently on Step 8 of 9

- Your Information Reviewed
- People Reviewed
- Household Details Reviewed
- Income Reviewed
- Expenses Reviewed
- Assets Reviewed
- Other Situations Reviewed
- Document Upload Reviewed
- Review and Submit Not Reviewed

Here are some suggested documents to upload.  
Your caseworker will let you know which ones are required to process your application.  
If you don't have them now, you can still submit your application. If you need help, ask your case worker.

**How to upload a document**

Learn how to upload a document, including how to use a mobile phone to take and upload a picture. You'll also learn how to view your upload receipts.

**Upload Documents**

**Proof of Financial Assets and Accounts** [Upload]

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Figure 4.2-17. Embedded videos keep the users within the app and aware of their in-progress transaction.



These recommendations are opportunities to update current designs to be in line with best practices. In designing these items, we will adhere to our collaborative, five-phase approach in order to validate the end-to-end impact of changes. Nevertheless, these concepts are illustrative of the kinds of improvements we want to see in the short term, to accelerate user-experience transformation through an updated BenefitsCal design to be in line with standard design industry best-practices.



Key highlights of our approach	
<b>Working together for a better UX</b>	<ul style="list-style-type: none"> <li>User-centered design relies on deep teamwork and inclusion with client stakeholders and other contractors, leveraging each group's unique expertise, to deliver the best outcome for residents.</li> </ul>
<b>Creating distance between generative and evaluative design processes</b>	<ul style="list-style-type: none"> <li>For design to influence the SDLC without creating unintended and negative consequences, our approach creates space for review, collaboration, and refinement of new design concepts derived from user-centered research, before they enter into sprint cycles.</li> <li>Once concepts are vetted and refined for feasibility and viability, they are supported and more fully defined, in high definition, by designers embedded with product development teams.</li> </ul>
<b>Measurement ensures meaningful improvement and accountability</b>	<ul style="list-style-type: none"> <li>By proposing a dedicated measurement phase to be added to the current 4-phase process, we create a mechanism to ensure design changes create substantive positive impact to service delivery.</li> <li>Our measurement strategy carefully analyzes engagement with metrics that relate to end-to-end experience, rather than isolated interactions.</li> </ul>
<b>Improved cross-disciplinary communication in favor of continuous improvement</b>	<ul style="list-style-type: none"> <li>We avoid unpleasant surprises by sharing design work early, and often, with diverse stakeholders across the Consortium.</li> <li>We invite recommendations on how best to integrate with current working groups, and value creative discourse around the constraints or tradeoffs that inevitably influence design decisions and transformations.</li> </ul>
Key deliverables	Alignment to the Consortium's vision
<ul style="list-style-type: none"> <li>BenefitsCal User Centered Design and Customer Experience Report Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.</li> <li>Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.</li> <li>Expand and further refine user-centered design (UCD) and the user experience (UX) within the software development process.</li> <li>Develop and implement additional data analytics capabilities to provide evidence-based outcomes and make informed decisions to improve those outcomes.</li> <li>Expand data mining, reporting and usage monitoring capabilities and apply results as usability improvements.</li> </ul>

### 4.2.3 UA4

Describe your approach to strengthening security measures associated with the application prior to release, including the CI/CD process, proactive security controls and testing.

#### 4.2.3.1 Understanding



Accenture Security is the largest cybersecurity consultancy in the world and recognized as a premier managed security services provider due to our industry-leading expertise and comprehensive service offerings. Our commitment to excellence is reflected in our numerous accolades, including top rankings in the Forrester Wave™ and Gartner Magic Quadrant for Managed Security Services publications. Our robust portfolio of services and innovative security solutions ensure that our clients are well-protected against the evolving threat landscape, making us the go-to partner for enterprises worldwide seeking unparalleled security and peace of mind.

Figure 4.2-18 highlights the depth of Accenture's security experience.



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Figure 4.2-18. Accenture is the leader in managed security services worldwide.

With a headcount of more than 20,000 cybersecurity practitioners worldwide, our sum is greater than the parts; our diverse team has the required skills, accelerators, and extensive experience in supporting multiple public sector clients with initiatives across the cybersecurity service spectrum, spanning cyber strategy, cyber-resilience (like endpoint detection and response), and cyber protection (like application security, privileged identity management, and data protection). The breadth of our team's experience across provisioning administrative, technical, and physical safeguards will help protect BenefitsCal assets against data loss, misuse, unauthorized access, disclosure, alteration, and destruction.

Our continuous integration and continuous delivery (CI/CD) process provides an end-to-end approach to proactively secure the software development pipeline to keep the digital core and supporting technology applications secure while staying ahead of an ever-evolving threat landscape. We will work with Consortium and the relevant stakeholders to introduce our CI/CD process which will build on top of the existing static and dynamic application security scanning capabilities. Our end-to-end process includes proactive security controls such as configuration management, infra-as-code scanning, cloud and container enablement, container security, application scanning, and vulnerability remediation at scale. We introduce each capability through pilots, where we align on secure design and architecture, before scaling out to the broader application and system ecosystem.

We have an onboarding process which relies on a risk-ranked inventory platform to determine the application and system onboarding roadmap and will inform the needed level of governance and change management for each system type. We adopt a minimum viable set of processes to support this phase with onboarding guides, prove out the CI/CD pipeline and complementary capabilities in a non-production environment, and establish a repeatable onboarding process for additional projects as we progress to production environments. We have white glove services for applications, architecture, and technical support for self-onboarding apps, self-service tools to enable scale at low-cost, and continue scaling out activities until DevSecOps by design is the norm. We build core capabilities in CI/CD engineering and security, governance leadership alignment and engagement, learning and development roles/teams, and build out a community of practice. Additional proactive security controls include providing a change management coach for the DevSecOps activities and provide routine security trainings, learning and development change analytics, and change reinforcement to ensure a repeatable, scalable, and secure process.

We understand that prioritizing the user experience is critical, and that at times, balancing security and user experience is easier said than done. To ensure that we are prioritizing our end users and their experience with the portal, our Security team will work with the UCD team and CalSAWS to drive these initiatives forward and work with the Consortium and other CalSAWS contractors to jointly prioritize the implementation of these initiatives based on the available capacity of the proposed Accenture Security team and aligned with the allocated standard change request hours.

Our years of experience within the CalSAWS work environment makes us uniquely suited to implement policies and procedures that confirm the best possible security. Accenture's

knowledge of the CalSAWS security framework accelerates the efforts to align security controls, tools, monitoring, and reporting across all systems.

For over 20 years, Accenture has been partnering with the Consortium to create the secure CalSAWS foundation of today. Within the span of those 20 years, Accenture has closely partnered with the Consortium Security team to implement enhancements in the CalSAWS environment, including controls such as requiring multi-factor authentication, implementing solutions to flag personally identifiable information within the cloud environment, and implementing automated solutions to proactively identify security findings in our source code repositories. These efforts have all been implemented with the view of continuing to harden and improve existing operations, while reducing security risk and potential audit findings. We look forward to extending the same security excellence you have come to expect on the back end of CalSAWS to the front end portal of BenefitsCal.



Accenture understands the complex security landscape that a public-facing website must navigate. Security controls and monitoring throughout the SDLC reduce the likelihood of allowing new security threats to impact the system. The breadth of our team's experience will help provide assurance that the end-to-end continuous integration and continuous delivery (CI/CD) pipeline will incorporate proactive security measures to keep the digital core and supporting technology applications secure. In the event of a security threat, Accenture has a proven track record of following escalation protocols to confirm the proper stakeholders are aware of the issue so that they can support containment and remediation activities.

#### **The recent security incident with BenefitsCal highlights the need for security**

**enhancements.** When we begin providing security services on BenefitsCal, we will take a proactive approach to security in collaboration with the Consortium and other stakeholders with a particular focus on careful treatment of PII as part of the user interface and API design process, robust threat intelligence, and expended security monitoring. In the next section, we go into more detail about the proposed enhancements to security that we would partner with the consortium to prioritize and implement.

### **4.2.3.2 Methodology/approach**

#### **Forward-looking Security Roadmap**

Our approach to security is to embed proactive security management into all aspects of our operation and make it as necessary as the air we breathe. We understand that security must be built into the designs from the start. As described in section 4.2.2-UA3, even in the UCD process, we will review all proposed designs to ensure that only necessary PII is included in screen layout. We then do regular scans of code to ensure no PII is inappropriately stored.

Through our extensive experience delivering maintenance and operations at CalSAWS, we understand the baseline needs to maintain operations, including supporting existing tooling around application security through tools such as Fortify for static application security test (SAST) scans, Qualys for endpoint detection and response (EDR) activities, and Splunk for security information and event management (SIEM) incident response. Our years of experience implementing and operating these exact toolsets for the back end systems of CalSAWS will ensure that the team we introduce for maintenance and

operations activities will be able to hit the ground running and quickly begin partnering with the Consortium to provide this same support to BenefitsCal, and ultimately the end users of the portal.

Given our institutional knowledge of the environment, the technology architecture, and the demands of maintaining and operating the system, there are a number of capabilities that we would propose in order to continue to evolve and enhance the security of the portal, without compromising the end user experience. All of these capabilities and enhancements will be subject to existing CalSAWS security policies and controls, and will be included in the forward-looking security roadmap with the recommended areas for improvement being mapped to security functional domains. These will be documented in the **BenefitsCal System Security Plan**. The following section outlines how we will do that using a well-established, coordinated process that aligns with CalSAWS policies and standards.

#### 4.2.3.2.1 DevSecOps architecture

First on the roadmap, Accenture will establish a secure development operations (DevSecOps) pipeline using a platform (such as Snyk) and other modern tools to prioritize security scanning of vulnerabilities in code repositories at each stage gate of the development lifecycle, including application code and infrastructure as code (i.e., Terraform) repositories, and incorporate standards and frameworks such as the OWASP Top Ten into the scan results.

DevSecOps is a software engineering approach that combines development, security, and operations teams to enable faster, more iterative software releases with increased agility and innovation. It involves integrating security practices and testing throughout the software development life cycle rather than treating it as a separate phase at the end. This approach allows for the early detection and resolution of security issues, reducing the risk of network penetration incidents and the theft of sensitive data. However, in the event a threat actor has compromised the environment as a result of a sophisticated attack, our teams will follow the Consortium-managed incident response process and alert the relevant team members within the SLA.

At Accenture, we propose adopting a DevSecOps approach that keeps the theme of "shift-left" of security tests within the SDLC and working closely with the contractor teams to evaluate and implement this as required. We will verify that the security requirements of the tooling meet CalSAWS' requirements and obtain contractor management authorization prior to implementing or acquiring any new system or tool. By incorporating security at the beginning of the delivery process, teams can deal with security issues as they arise instead of at the end of a lifecycle, such as mitigating the exposure of PII in the code prior to releasing the code into production.

The DevSecOps framework is a comprehensive approach to integrating security practices into the software development lifecycle and operations processes. It emphasizes synchronization and communication between development, security, and operations teams to confirm that security is built into every stage of the software delivery pipeline. Figure 4.2-19 illustrates the continuous nature of the framework.



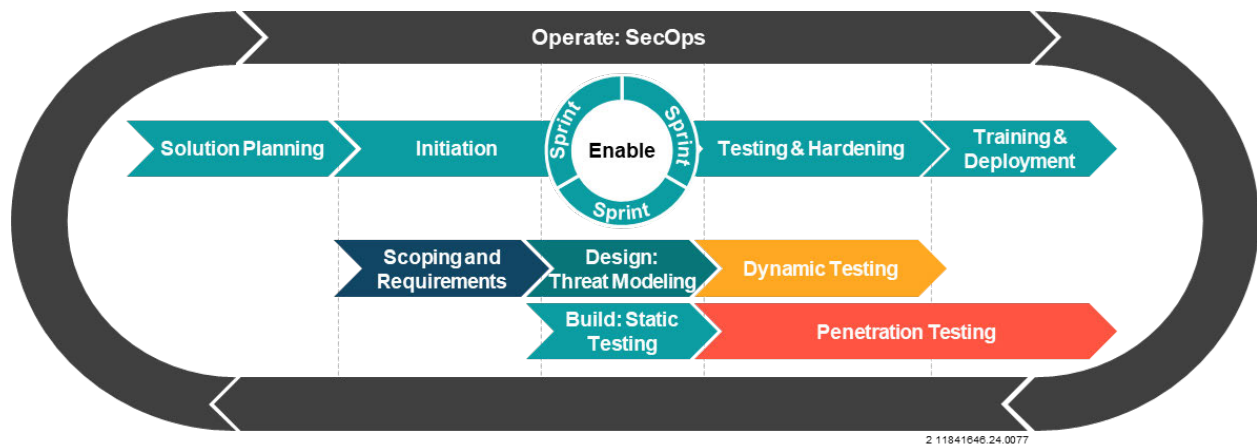


Figure 4.2-19. DevSecOps embeds security into each phase of development to verify that security is always at the forefront.

**Scoping and requirements:** Helps to verify that security scope and requirements are considered from the outset to promote that functionalities are developed with the appropriate security capabilities to support them. We understand cooperation with the client and various contractors (such as FIS, ForgeRock, and CalSAWS) will be needed across the design, development, and operationalization phases to agree on the scope and nature of each change and confirm that the impacts across teams and contractors are considered. Only when a change has been properly reviewed and approved by the client will we proceed with implementing any given change. We document this in the BenefitsCal System Security Plan.

**Design – Threat modeling:** In an effort to verify a proactive approach to maintaining the security posture of the BenefitsCal environment, we will use threat modelling to systematically identify, understand, and mitigate potential threats to the environment. By analyzing the architecture, processes, and data flows, we will be able to pinpoint how an attacker might exploit potential vulnerabilities in the environment.

**Build – Static testing:** Static application security testing (SAST) is a “white box” security testing that will help to examine the product source code, byte code, or application binaries for conditions indicative of a security vulnerability, using commonly accepted frameworks and standards such as the OWASP Top Ten to inform the results. We will work along with the CalSAWS M&O contractor to support the testing activities for backend infrastructure and APIs associated with the portal.

**Test – Dynamic testing:** Dynamic application security testing (DAST) is a “black box” security testing that will help to examine the application in its running state and will try to poke it and prod it in unexpected ways to discover potential security vulnerabilities. Similar to the SAST testing, we will confirm cross-contractor cooperation to help identify and remediate security findings within the CalSAWS-defined change control and security testing processes.

**Deploy – Penetration testing:** Penetration testing will simulate a multitude of real-world attacks. Our testing methodology simulates a real hacker and what they can do to penetrate the product and retrieve confidential data.

**Operate – SecOps:** A robust production security testing program consists of monitoring and dynamically filtering security events, automated vulnerability scanning, and configuration enforcement. This allows for timely detection of vulnerabilities within CalSAWS infrastructure network and system components (e.g., network vulnerability assessment, penetration testing, application and infrastructure security scans) to confirm the efficiency of implemented security controls.

The DevSecOps framework aims to break down silos between development, security, and operations teams, enabling them to work together seamlessly. It emphasizes automation, continuous integration and continuous delivery, and the use of secure development practices and tools. By integrating security into every stage of the SDLC, organizations can build and deliver secure software more efficiently and effectively.

#### 4.2.3.2.2 Purple team

Once a DevSecOps framework and pipeline has been established, we are recommending the introduction of a Purple team to continuously harden the portal. The term “Purple team” refers to executing penetration testing and remediation activities in a cyclical manner.

Through the creation of the Purple team, Accenture will establish an alliance between penetration testing (Red team) and remediation/recovery (Blue team) activities, which in combination, establishes the Purple team. The objective of the Purple team is to work seamlessly together to remediate security vulnerabilities identified during penetration testing. After the Blue team has resolved the issues, the Red team will re-execute its test. This will shift the penetration test activities from a once-a-year exercise to a cooperative, iterative, and continuous process, allowing for significant security benefits in the form of a continuously hardened environment. We will work collaboratively with the Consortium Security team and any key contractors to evaluate the optimal frequency for executing Purple team activities.

Our clients in industries heavily targeted by threat actors (such as financial services and commercial banking) have benefited greatly from a continuous hardening approach, often finding and remediating vulnerabilities in their environment before bad actors can find the exploit. Also, relevant information about the recovery process and testing will be featured in the **BenefitsCal Technology Recovery Plan**. Figure 4.2-20 compares the current process to the collaborative process.

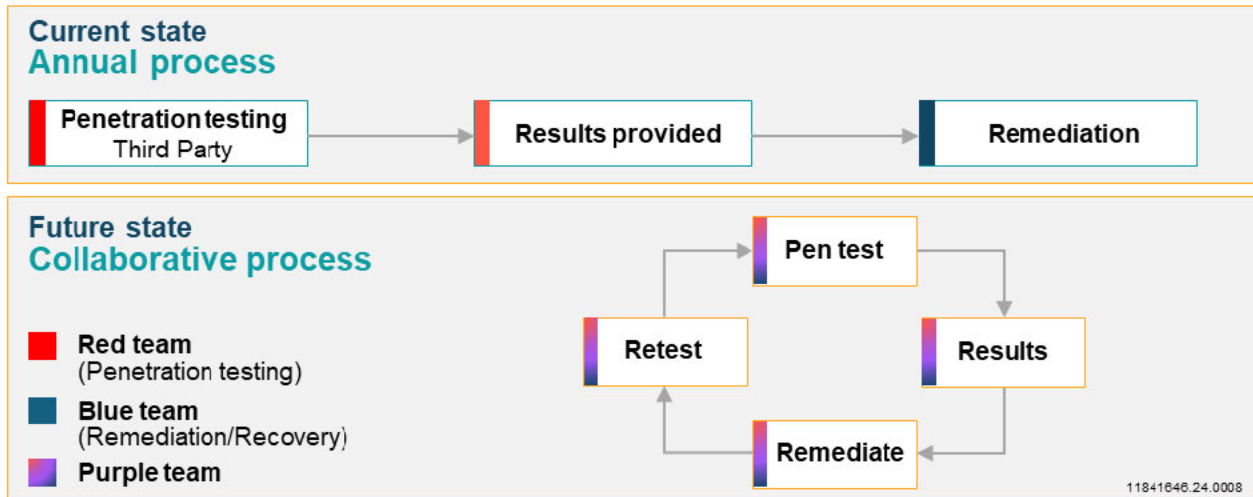


Figure 4.2-20. The Purple team approach supports a timely remediation and retest process.

#### 4.2.3.2.3 Automated Continuous Compliance



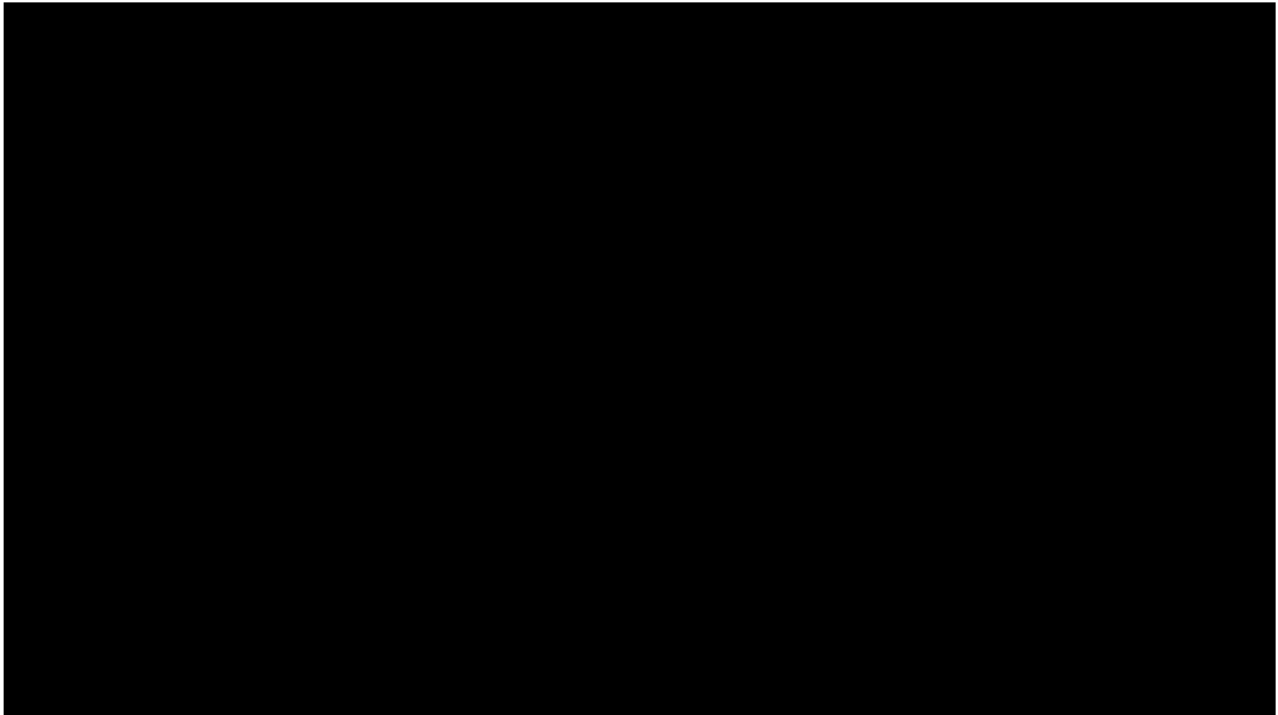


Figure 4.2-21. AC2 provides greater efficiency & transparency of security compliance.



### Key highlights of our approach

Experience	<ul style="list-style-type: none"> <li>Guided by our experience, learnings, and improvements made to the overall security posture at CalSAWS as well as the best practices, capabilities of our industry leading cybersecurity practice.</li> </ul>
Integrate security into SDLC	<ul style="list-style-type: none"> <li>DevSecOps framework provides a comprehensive approach to integrating security practices into the software development lifecycle (SDLC) and operations processes.</li> </ul>
CI/CD	<ul style="list-style-type: none"> <li>DevSecOps emphasizes automation, continuous integration and continuous delivery, and the use of secure development practices and tools.</li> </ul>

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### Key deliverables Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal System Security Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs as it relates to all aspects of Security.</li> <li>Focused collaboration with CalSAWS contractors on all security elements.</li> <li>Employ AWS design principles to strengthen operational security and automate security best practices.</li> <li>Balancing consumer experience with applicable security requirements.</li> </ul>
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## 4.3 – Understanding and approach to application evolution and innovation

### 4.3.1 Understanding and approach overview

With the implementation of BenefitsCal, you've delivered a modern application architecture built on a mobile-first platform—enabling residents and community-based organizations (CBOs) to connect with the CalSAWS system and ultimately, counties, in new ways. Even with this impressive progress, in a rapidly changing technological and business landscape, application evolution and innovation are essential.

This next phase of BenefitsCal brings the opportunity to do even more to make the lives of vulnerable Californians—and the people who serve them—better. You now have the chance to go further—to confirm the human experience is truly at the forefront of system design, improve security, and fully integrate front-facing and back-end systems, ensuring both users and county workers are supported. You have the opportunity to improve BenefitsCal outcomes and get benefits to people who need them faster and more effectively. Accenture is the right partner to join you in this next stage of BenefitsCal's evolution.

Through purposeful, outcomes-driven evolution and innovation, we'll help you enable BenefitsCal to adapt to new challenges and opportunities, including ever-changing business needs and user expectations. We'll ensure you take advantage of the latest technological advancements, bringing improved performance and scalability, security and compliance, maintenance, and manageability, for long-term success and sustainability.

Accenture's clients, including CalSAWS, have seen the power of bringing people and processes together with technology to evolve and innovate—and have realized measurable benefits. With our comprehensive range of services, solutions, and unmatched industry expertise, we help our clients harness the power of cutting-edge technologies to achieve greater growth, efficiency, and resilience. **We infuse the latest technology and industry advancements into all our work and make significant investments in assets and solutions—and in the skills of our people—to ensure we stay ahead of change.** In fiscal 2023 alone, we invested \$1.3 billion in R&D in our assets, platforms, and solutions and \$1.1 billion in training and development of our people. We also announced a \$3 billion investment in our Data and AI practice.





Importantly, Accenture continues to make significant investments and acquisitions to enhance our security capabilities. We provide highly differentiated security operations services, with mature accelerators, delivery tools, and methods to address our clients' toughest challenges. We have provided these services to more than [REDACTED] clients across [REDACTED] countries. Our approach has earned us recognition as the number one provider in the 2023 Gartner Market Share: Managed Security Services Worldwide 2022 report.

We are well positioned to help BenefitsCal evolve and innovate to better serve your stakeholders. With 23 years of experience at CalSAWS, we understand your unique requirements, systems, and culture. This knowledge enables us to envision and implement new technology and proven processes to drive productivity and reduce costs.

Our expertise goes beyond knowing that BenefitsCal interfaces with CalSAWS. We understand the tight integration between the portal, ForgeRock, Hyland Imaging, and CalSAWS systems better than anyone else. This intimate knowledge ensures that when changes are envisioned in the user-facing portal, we know how they might impact the back end. This enables us to engage the CalSAWS M&E and infrastructure contractors early—to help design the best overall experience, adapting the back end to maintain effective, efficient end-to-end processes, benefiting users and county staff.

With continuous improvement as a key tenet of the service we'll bring to BenefitsCal, we'll help you evolve and innovate for impact. For enhancements falling under both evolution (updating and/or revising existing items/software/processes) and innovation (new items/software/processes), we'll propose innovative solutions—including automation, machine learning (ML), artificial intelligence (AI), and generative AI (GenAI). We'll integrate data analytics with these innovations, providing evidence-based outcomes and enabling real-time insights and better decision-making.

We understand BenefitsCal has defined hours allocated for SCRs and that additional application functionality may also be prioritized and allocated separate funding as part of the State premise item process. We will follow the SCR and stakeholder Collaboration Model processes as we work with the Consortium to identify and prioritize evolution and innovation opportunities that bring value to BenefitsCal's many stakeholders.

### 4.3.2 UA5

Describe your strategy and approach to application architecture evolution. Describe how this strategy will address security considerations, reduce costs, and improve optimization, scalability and flexibility.

#### 4.3.2.1 Strategy and approach to application architecture evolution

In a rapidly changing technological and business landscape, evolving BenefitsCal's application architecture is critical to your future success. Only through evolution of the portal—and the critical CalSAWS back-end systems it relies on—will BenefitsCal be enabled to keep up with the pace of changing user needs and expectations; take advantage of technological advancements; respond to new legislative mandates; close gaps in functionality; and critically, stay ahead of evolving security threats. As we work

with you to continually improve, we'll address these considerations, with proposed enhancements that reduce costs and improve optimization, scalability, and flexibility.

#### 4.3.2.1.1 A differentiated approach to M&O and enhancements

Combining people, processes, and technology, our approach is informed by user-centered design (UCD), centered on stakeholder inclusivity and the integration of front-facing and back-end systems, and underpinned by the drive to continuously achieve positive outcomes for BenefitsCal.

Our approach sets us apart from other contractors, as our goals extend beyond traditional maintenance, operations, and enhancements. As we perform M&O services and look to evolve the BenefitsCal application architecture, we will decisively aim to help align your IT investments with business outcomes—continuously improving and optimizing value. Our objective is purposeful evolution of the BenefitsCal architecture. Not change for the sake of change, but to further empower your mission.

Accenture's Operations teams are comprised of a collection of engineers—not just traditional operators—and they will manage your application while continuously evaluating the landscape for improvement opportunities. Our experience at CalSAWS particularly enables us to readily identify processes for standardization, automation, and artificial intelligence (AI) incorporation; anticipate issues; solve problems quickly and efficiently; and meet, and likely exceed, your expectations.

This includes finding opportunities to improve service performance and user experiences; increase productivity and efficiencies; enable operational excellence; lower costs; reduce—and even eliminate—work; and enhance security. We'll consider both front-end user experiences and back-end integrations, functions, and capabilities. With this end-to-end perspective, we'll drive near-term gains while strengthening core operations for long-term continuous improvement and stability.

To accomplish these outcomes, we implement innovative solutions including automation and generative AI (GenAI). In fact, this is how Accenture delivers across all our infrastructure and application support engagements globally. We integrate analytics with AI and industry expertise to enable real-time insights and better decision-making. In Figure 4.3-1, we highlight results achieved for our clients using automation. With over [REDACTED] automation specialists, Accenture is leading the way in automation, including within our organization. Accenture's global IT leverages over 2,500 automations that execute about four million hours of work every month, reducing IT operating costs while staying secure, improving experiences, and generating 360-degree value.

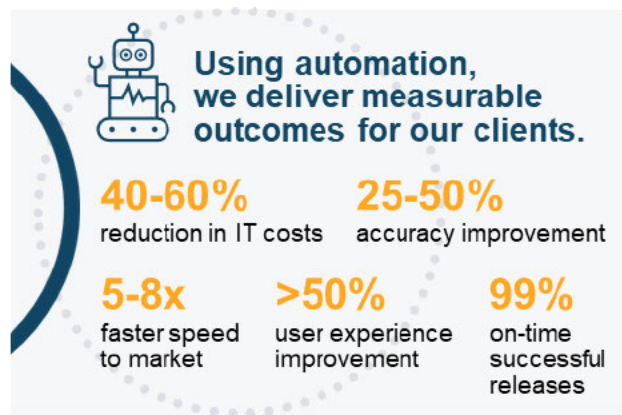


Figure 4.3-1. With an automation-everywhere approach, we drive measurable outcomes.

To drive this work, we apply our continuous improvement (CI) framework built around three pillars: people, process, and technology. Illustrated in Figure 4.3-2,

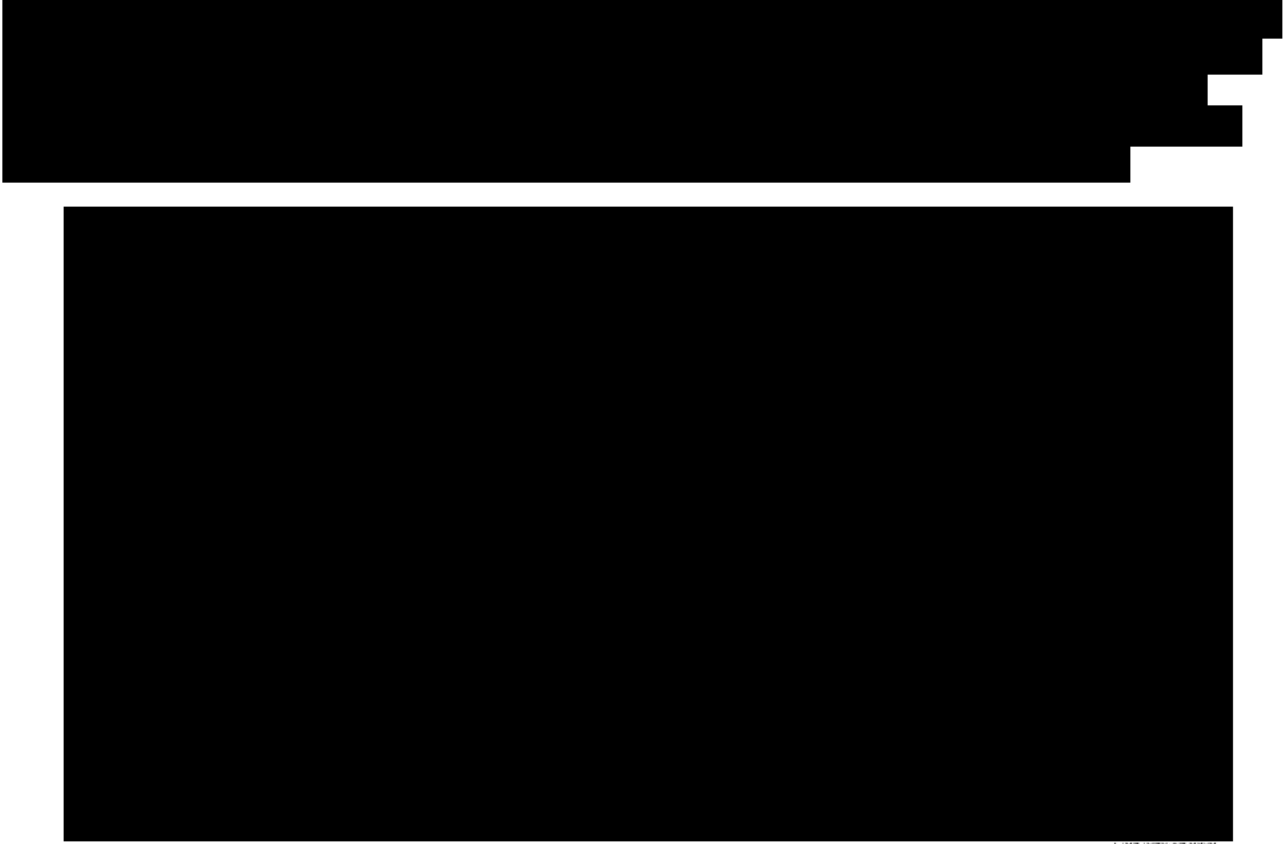


Figure 4.3-2. Through our continuous improvement framework, we will deliver sustained value and performance improvements for BenefitsCal.

- **Service Reliability Engineering (SRE):** Combines knowledge, mindset, and skills to drive a change in culture with a focus on continuous improvement and automation. Our SRE team will deliver enhancements within the allocated hours. We drive improvements to the BenefitsCal application through both the application evolution and innovation workstreams, with a focus on:
  - **monitoring** and leveraging insights and dashboards.
  - **assessing** the product through analyzing data from surveys, UCD results, and analytics-driven reporting which helps identify key areas for automation.
  - **measuring** against key performance indicators (KPIs) identified and agreed upon with the Consortium and stakeholders. Using this data, we propose ways to enhance the existing application and experience.

- [Redacted]

- **AI-powered automation:** We use industry standards and the latest technology to drive end-to-end automation for our clients. Incorporating AI and machine learning (ML) capabilities, we analyze ticket data, resolution patterns, knowledge artifacts, accelerators, and more for predictive operations and better project execution at scale and with agility. As we design and develop innovative solutions for BenefitsCal, we'll consider the latest AWS automation, AI, and ML capabilities as part of our process.



As part of our overall evolution strategy, we will provide AI thought leadership and will document and deliver the **BenefitsCal Approach to Automation, Artificial Intelligence, and Machine Learning**. Using these technologies, we will enhance code quality and automate high-volume, repetitive, or error-prone manual and automated tasks to increase accuracy, reduce costs, and improve the user experience.

In Figure 4.3-3, we highlight our work for a national health insurer where Accenture's continuous improvement efforts, including the application of SRE and our OPERA framework, led to meaningful business results for our client.

### National Health Insurer Application Reliability Engineering Support (ARES)

#### Opportunity

A national health insurer with over 17 million members and approximately one million claims processed daily, faced the challenge of instability in their production environment negatively impacting their business.

#### Accenture's role

Our client called on Accenture to bring a managed service solution to their most important product lines with the goals of driving reliability and stability into the production environment and delivering consistent outcomes. This complex engagement

#### Value delivered

Figure 4.3-3. For a national health insurer, we brought together people, processes, and technology to realize measurable outcomes.

### 4.3.2.1.2 An evolution model guided by UCD, collaboration, and continuous improvement

Underpinned by Accenture's continuous improvement framework, our BenefitsCal evolution model is guided by UCD and collaboration. To advance both front-end aspects of the BenefitsCal Portal and the back-end integrations that enable its functionality, we will apply the same process that drives UCD, as detailed in Section 4.2. This ensures that the user experience is integrated into all aspects of evolution.

An expansion of the current BenefitsCal UCD model, this approach adds measurement against established KPIs and a feedback loop—a continuous cycle for continuous improvement—with security at the core. This is a change from the current enhancement model which seemingly relies on a linear process with distinct start and end points, and only front-end-focused goals.

Stakeholder inclusivity is infused throughout the evolution process lifecycle—from ideas to action and measurement—with analysis of outcomes feeding into new improvement ideas. Only in this way can you ensure BenefitsCal works for all stakeholders as the application architecture evolves following SCR and Collaboration Model processes. In Figure 4.3-4, we illustrate our proposed model for continuously evolving your application architecture. Though the Inputs and Assess steps are distinct for application evolution and innovation, we follow the same unified process described in Section 4.2, with unified backlog, implementation, and measurement.

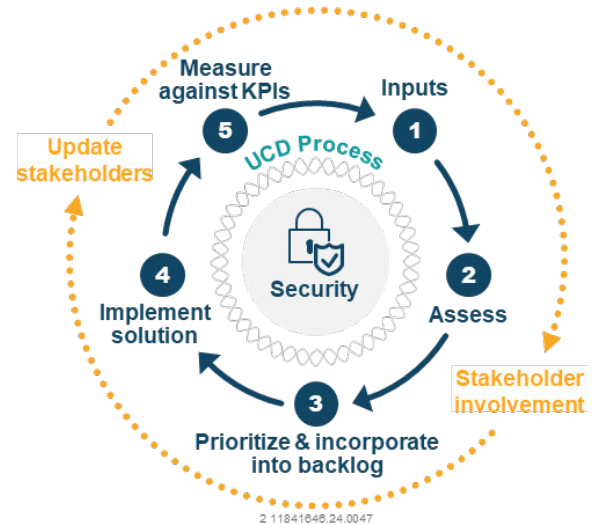


Figure 4.3-4. Through our closed-loop application evolution model, we'll deliver continuous improvements aligned with stakeholder and business needs.

#### 4.3.2.1.2.1 1 Inputs

Gathering inputs and conducting discovery is vital for understanding the current state of the application, identifying user needs, and pinpointing areas for improvement. This step ensures that the evolution of the application is outcomes-focused, data-driven, and aligned with stakeholder needs and expectations.



In Section 4.2–UA3, we describe UCD as a driver for enhancements impacting the experience of both users and county workers. Here, we focus on inputs related to situations where technical enhancements to the architecture are needed for security or performance reasons, or to enable front-end changes. With these inputs, we confirm we take an end-to-end, holistic view of enhancements and their impact on people, processes, and technology.



As depicted in Figure 4.3-5, we'll seek input from multiple sources to develop a pipeline of enhancement ideas. From the stakeholder community—users, counties, advocates, CBOs, State partners, CWDA, SEIU, and the Consortium—to other contractors, our M&O teams, and more, we'll be inclusive and collaborative as we work to move BenefitsCal forward. As part of idea generation, we will gather input from sources including, but not limited to, the following:

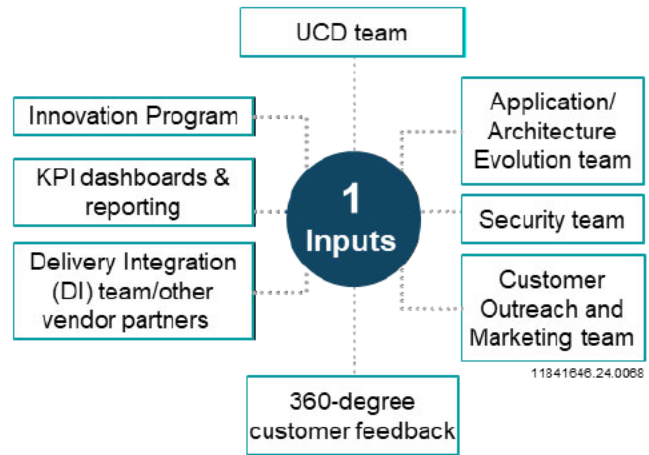


Figure 4.3-5. We'll seek input from multiple sources as part of our robust enhancement strategy.

#### 4.3.2.1.2.1.1 Production Operations teams

Each of our Operations teams offers unique insights that contribute to a well-rounded and robust enhancement strategy. By following structured processes for each team, we ensure that all perspectives are considered, leading to a more successful and user-centric application that keeps BenefitsCal ahead of change.

<b>Who:</b>	Production Operations teams
<b>When:</b>	Monthly

#### UCD team

The UCD team focuses on keeping the human experience at the forefront of system design, confirming the application is intuitive, accessible, and meets user needs. Their insights are critical inputs for designing user-friendly interfaces and enhancing overall user satisfaction. The UCD process will be used to validate other enhancement aspects, including architecture, marketing, security, and more. We detail the UCD process in Section 4.2–UA3.

#### Application/Architecture Evolution team

The Application/Architecture Evolution team is instrumental in identifying technical bottlenecks, potential areas for scalability, and opportunities for integrating new technologies. Their input helps in understanding the feasibility and impact of proposed changes from a technical perspective. We will review existing architecture and enhancement opportunities with consideration for the following:

- **DevOps process:** Apply current DevOps best practices to every SCR and BenefitsCal enhancement and identify process improvements.

- **Secure by design:** Infuse security at every level of our process. The Application/Architecture Evolution team reviews all changes with our Security team against best practices.
- **Decoupled integrations:** Ensure solutions are designed to have minimal impacts when downstream systems are experiencing issues (e.g., CalSAWS).
- **Observability through AI:** Review insights, automated analytics, reports/dashboards, and provide actionable insights for improvements or self-healing mechanisms.
- **Bundled approach:** Evaluate emerging technologies and ensure all designs are created with consideration for the technology roadmap.
- **User-centered design:** Ensure direct integration of the UCD team into the review process, designs, and implementation of technical enhancements.
- **Architecture Review Board:** Conduct weekly reviews of all new changes. Reviews include relevant teams and stakeholders required to approve architectural designs. The Review Board provides enterprise architecture governance to assess, evaluate, approve, or reject architectural designs and align accepted designs with business and technical strategic goals.

### Security team



The Security team's input helps ensure that the application remains secure and compliant with regulations, protecting BenefitsCal systems and the data and assets of those who receive benefits. Our security approach, detailed in Section 4.2–UA4, embeds proactive security management into all aspects of our operation. Among the security-related activities that will result in evolution inputs are the following:

- **Review of best practices around authentication:** We will perform a comprehensive assessment to confirm all avenues of portal access require a secondary factor (i.e., SMS, email code, biometric scan, etc.). This provides greater assurance that only authorized individuals access the portal.
- **Advanced adversary attack readiness operations:** Annually, we will facilitate a cyberattack simulation resembling nation-state activity aimed at stealing funds or damaging critical infrastructure, resulting in a report that identifies key areas of risk and vulnerabilities to prioritize for remediation.

### We conducted advanced adversary attack readiness operations at a financial services company, providing a realistic assessment of their security posture

To expose key security risks and vulnerabilities for our client, we simulated a sophisticated cyberattack and attempted SWIFT wire transfers. After penetrating the network perimeter and subverting both preventative and detective controls, Accenture successfully transferred USD \$500,000 (the agreed-upon threshold) out of the bank without detection.

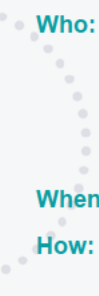
Based on the findings of these operations, our client developed a culture of cyber-resilience and remediated vulnerabilities—ensuring they stay ahead of emerging threats.

### Customer Outreach and Marketing team

Input from our Customer Outreach and Marketing team ensures that the application's evolution aligns with user demands. It further enables effective communication of BenefitsCal messaging and information to specific audiences. We detail our strategy and approach for public communications and marketing in Section 4.4–UA9.

#### 4.3.2.1.2.1.2 360-degree customer feedback

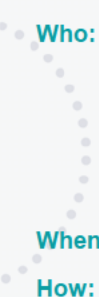
Collecting 360-degree feedback is essential for understanding the diverse needs and experiences of all stakeholders involved with the BenefitsCal application. We will conduct regular surveys of key stakeholders—including users, counties, advocacy groups, CBOs, State partners, and others. Always-on surveys will be accessible via the BenefitsCal Portal and additional stakeholder surveys will be sent quarterly via email. With these inputs, we ensure the application is designed and evolved in a way that meets the expectations and needs of all relevant parties.



<b>Who:</b>	Public users, counties, advocacy groups, CBOs, State partners, CWDA, SEIU
<b>When:</b>	Ongoing/Quarterly
<b>How:</b>	Electronic surveys via BenefitsCal site

#### 4.3.2.1.2.1.3 Delivery Integration (DI) team/other contractor partners

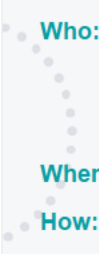
Input from the DI team and other contractor partners is essential for the seamless evolution of BenefitsCal. Each group brings specialized expertise and insights that are crucial for ensuring the application's holistic development and fully integrated, end-to-end operations. We will incorporate input from these parties, as well as external contractor roadmap items, into our idea pipeline as appropriate. As an example, we will take advantage of Amazon Web Services (AWS) innovations and new services. We'll involve AWS in all aspects of the evolution process, including reviewing architecture diagrams for AWS best practices. We detail how we will collaborate with the DI team and other contractor partners in Section 4.1–UA1.



<b>Who:</b>	DI team, M&E and infrastructure, Consortium QA team, contractor partners: AWS, ForgeRock
<b>When:</b>	Quarterly
<b>How:</b>	Workshops

#### 4.3.2.1.2.1.4 KPI dashboards and reporting

The output from reports and dashboards will be reviewed against established KPIs and feed into the evolution process. As enhancements are implemented and results are analyzed, dashboards will be updated and/or new dashboards will be created to include meaningful data in a context that enables insights and data-driven actions. In Section 4.4, we provide additional discussion around using metrics to increase transparency and confirm we're on track, moving toward common targets.



<b>Who:</b>	Internal team responsible for reporting/dashboarding
<b>When:</b>	Ongoing
<b>How:</b>	Dashboards, reports

In Figure 4.3-6, we consider the BenefitsCal document classification process to illustrate how we will use KPI data to inform application evolution.



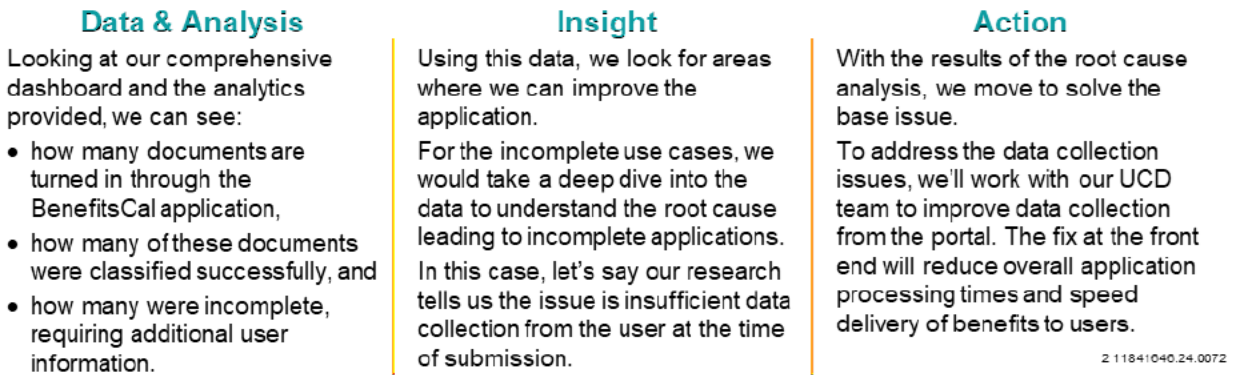


Figure 4.3-6. We analyze meaningful KPIs to enable insights and data-driven actions.

#### 4.3.2.1.2.1.5 Innovation Program

Through participation in the CalSAWS Innovation Program, we will have additional opportunities to explore, identify, and learn about emerging technologies. Via an Annual Innovation Day, Quarterly Innovation Challenges, and open innovation channels, we'll gather innovative ideas to improve business processes, system functions, and aspects of the BenefitsCal solution. As part of our open innovation channels, we propose adding a CalSAWS ServiceNow Idea Portal for users to submit, vote, and comment on ideas. We also propose adding a link to the BenefitsCal Portal to make it easy for users, advocates, and CBOs to submit innovation and improvement ideas. In Section 4.3–UA6, we provide details about our proposed innovation framework.

<b>Who:</b>	CalSAWS Innovation team
<b>When:</b>	Ongoing
<b>How:</b>	Innovation Program

#### 4.3.2.1.2.2 2 Assess

Assessing the gathered inputs enables us to identify the most critical areas for improvement and innovation. This step ensures that we focus on changes that will have the greatest impact on user satisfaction and business goals. Assessments will be conducted in collaboration with multiple stakeholder groups and in coordination with the DI team, the Architecture Review Board (ARB), and appropriate contractors. This stage may involve some or all of the following:

- **Gap analysis:** Compare current capabilities with desired outcomes to identify gaps.
- **Feasibility study:** Evaluate the technical and financial feasibility of potential improvements. Weigh effort against costs. Consider change management efforts.
- **Risk assessment:** Identify potential risks associated with proposed changes and develop mitigation strategies.
- **Impact analysis:** Assess the potential impact of changes on user experience, performance, security, and business objectives including cost reduction and improved optimization, flexibility, and scalability. Consider KPI criteria.

#### 4.3.2.1.2.3 3 Prioritize and incorporate into backlog

Prioritizing enhancements based on assessments and incorporating them into a structured backlog ensures that the most valuable and effective changes are implemented first. This

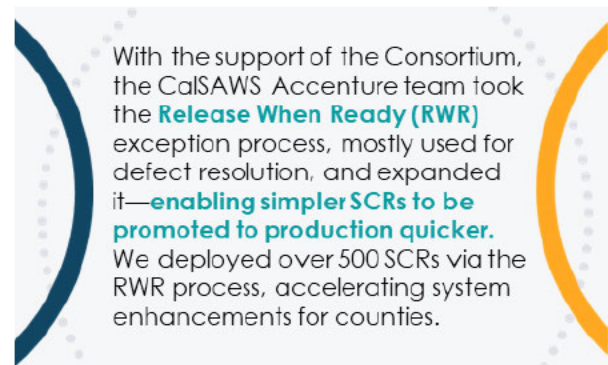
step helps manage resources efficiently and aligns development efforts with the BenefitsCal Strategic Plan and vision. This stage involves the following:

- **Value assessment:** Evaluate the potential value of each improvement based on user impact and business goals versus effort and cost.
- **Prioritization framework and governance:** Use a prioritization framework and governance process to rank improvements.
- **Backlog management:** Incorporate prioritized items into the product backlog, ensuring clear documentation and acceptance criteria.
- **Stakeholder alignment and Collaboration Model process:** Ensure all stakeholders agree on priorities and understand the rationale behind decisions.
- **SCR process:** Follow the SCR process to prioritize and incorporate ideas into the backlog, involving the DI team and other contractors as required.
  - **Estimation:** Build a realistic estimate of the effort required to complete each enhancement. Using proven Accenture Delivery Methods (ADM) estimators to determine the effort, we'll benchmark against similar projects to validate.
- **Strategic Plan updates:** Bring learnings from application evolution and innovation efforts to update the Strategic Plan annually.

#### 4.3.2.1.2.4 4 Implement solution

The Implementation stage is where planned improvements are developed and integrated into the application. This step ensures changes are executed efficiently, with a focus on quality, and confirms front- and back-end systems are integrated. The solution Implementation stage involves the following:

- **Hybrid-Agile methodology:** Apply Agile practices for iterative development, enabling flexibility and continuous feedback as described in Section 4.2–UA3.
- **Release When Ready (RWR):** Broaden the CalSAWS application RWR approach to encompass BenefitsCal in coordination with other CalSAWS system changes.
- **Update M&O Operational Working Documents (OWDs):** Confirm documents are updated to reflect detailed procedures for the activities and processes related to the new solution.
- **Update plans:** Contribute to the following BenefitsCal documents as appropriate: User Centered Design Plan and Customer Experience Report Plan, Requirements Traceability Matrix (RTM) and Report, General Design Document (GDD), Performance Test Materials Packet, System Security Plan, and Marketing and Public Communications Plan.
- **Integrations:** Confirm and develop appropriate monitoring, alerting, and network operations center (NOC) team integrations.






- **Multi-contractors, cross-functional teams:** Engage the DI team, multiple contractors, and cross-functional teams as required to address all aspects of development, from coding and security to user-facing portal design.
- **Automated testing:** Implement automated testing to reduce the risk of defects and ensure security and confirm high-quality code.
- **Continuous integration/continuous delivery (CI/CD):** Use CI/CD pipelines to streamline the deployment process and minimize downtime.

#### 4.3.2.1.2.5 **5** Measure against KPIs

Measuring the impact of implemented changes against predefined KPIs is essential for evaluating success and guiding future improvements. This step ensures that the application continues to evolve based on outcomes and data-driven insights. As part of this stage, we will provide BenefitsCal with data and supporting back-up detail, including metrics used to gauge the success of the user experience, performance indicators, and outcomes; website usage and useability targets; and targeted objectives as requested by the Consortium. The Measure stage involves the following:

- **Define KPIs:** Establish clear KPIs aligned with business goals, such as user engagement, performance metrics, and customer satisfaction. With KPIs aligned to the shared mission of improving outcomes for Californians, we will drive toward common goals, adjusting as needed to confirm we reach our targets.
- **Data collection:** Use analytics tools to collect data on application performance and user behavior. Following implementation, update/create dashboards to include new KPIs/data as required.
- **Regular review:** Conduct regular reviews of KPI performance to identify areas for further improvement.
- **Iterative improvement/feedback loop:** Use insights from KPI analysis to inform future development cycles and backlog prioritization. Adjust KPIs as appropriate following analysis.



Forming a strategic, outcomes-driven partnership, we aimed to deliver more predictable results, improved governance, and better overall performance.

With a one-team mindset and a common understanding of the metrics required to deliver, we made meaningful changes to our client's operating procedures. Effective communication, including transparency around metric status, was key to our combined success. To accomplish this, we created dashboards providing a single pane of glass for monitoring infrastructure health. We also automated environment health reports and sent them to client leadership and distributed a daily email to all team members.

#### **Project outcomes and value delivered:**



### 4.3.2.1.3 Outcomes-focused application architecture evolution



As part of our evolution strategy and approach, we will **address security considerations, reduce costs, and improve optimization, scalability, and flexibility**. We already have ideas for how we can quickly bring value and improve outcomes for BenefitsCal.

The following are some of the ideas for enhancements we can bring through the SCR and Collaboration Model processes in the first three to four months of the engagement. We will also address your required improvements like adding a direct public link to BenefitsCal.com from the BenefitsCal YouTube channel. All these initiatives, including enhancements to address current functional and user-experience gaps, are designed to quickly bring maximum value. We also showcase examples of real client impact demonstrating how we've helped other organizations implement similar initiatives and realize positive outcomes. We will bring the same mindset and similar innovative solutions to help evolve the BenefitsCal application architecture and deliver value to you and your stakeholders.

#### What it means to BenefitsCal

- ✓ **Reduced cost:** Ensures users have the information they need. This facilitates accurate application completion, minimizes abandoned submissions, and decreases caseworker workload.
- ✓ **Improved optimization:** Utilizing closed GenAI to efficiently analyze and categorize BenefitsCal website content ensures users receive relevant, accurate information.
- ✓ **Improved scalability:** Automation effortlessly handles increased volumes of user queries without requiring proportional increases in human resources.
- ✓ **Improved flexibility:** Adapts to diverse user needs and evolving web content, providing timely and relevant information in various contexts.

directing them to the Help Center, as shown in Figure 4.3-7 is a screenshot taken from BenefitsCal on July 24, 2024. Our solution aims to improve Robin's performance, reliability, and inclusivity for all users. Among the features of the Robin GenAI solution are the following:

- **Natural Language Processing (NLP):** Enables Robin to understand and generate human language in multiple languages through detection, translation,

#### 4.3.2.1.3.1 Robin enhancements

Enhanced with GenAI and guided by UCD, BenefitsCal's virtual assistant, Robin, will improve experiences for users and other stakeholders. With clearer guidance provided to users, this upgrade will reduce abandoned applications and provide caseworkers with more comprehensive applications, minimizing follow-ups, speeding processing times, and reducing the burden on counties. Currently, Robin's low use is due to its failure to handle basic queries effectively; for example, when users ask, "How do I apply for CalFresh?" Robin replies with a generic message

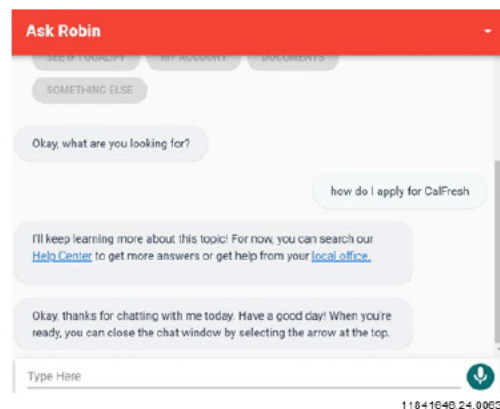
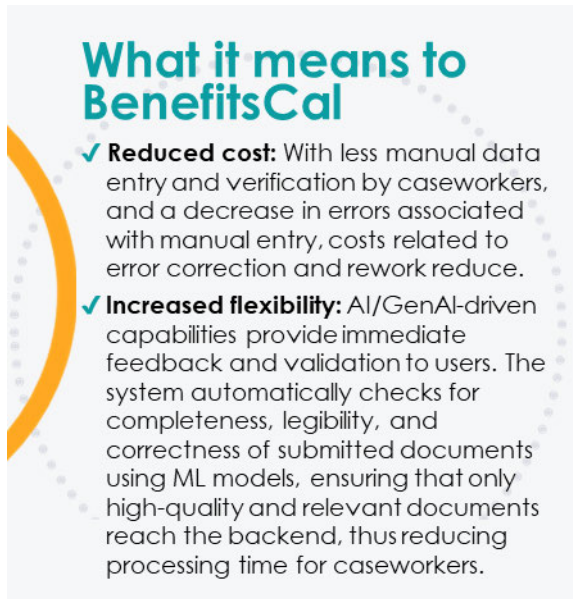


Figure 4.3-7. Robin is unable to answer the most basic queries. With a UCD approach and GenAI, we'll enable Robin to provide efficient, accessible, and accurate self-service assistance to BenefitsCal users.

intent recognition, and sentiment analysis. NLP helps users navigate website content and YouTube videos.

- **Knowledge Base:** Integrates pre-approved responses with BenefitsCal web pages and features automated content refreshes to keep information updated with regular and on-demand updates.

Our experience includes work with DC Health, where we integrated GenAI into the Amazon Lex framework, enabling precise, dynamic interactions. We are ready to apply this advanced solution to BenefitsCal for a seamless and intuitive user experience.



**What it means to BenefitsCal**

- ✓ **Reduced cost:** With less manual data entry and verification by caseworkers, and a decrease in errors associated with manual entry, costs related to error correction and rework reduce.
- ✓ **Increased flexibility:** AI/GenAI-driven capabilities provide immediate feedback and validation to users. The system automatically checks for completeness, legibility, and correctness of submitted documents using ML models, ensuring that only high-quality and relevant documents reach the backend, thus reducing processing time for caseworkers.

#### 4.3.2.1.3.2 Intelligent document processing (IDP)

A GenAI case assistant can seamlessly integrate into BenefitsCal's workflow to automate document processing and validate user eligibility. This speeds validation times, provides real-time feedback, enhances submission accuracy, reduces errors, and streamlines user interactions. By driving efficiency and reducing manual effort, it reinforces BenefitsCal's commitment to secure, user-centric document processing and offers scalability and actionable insights for optimized operations.

Designed to always keep a human at the helm, our solution uses caseworker feedback to continually improve the ML model. Currently, 46

percent of documents submitted to BenefitsCal are corrected or flagged by the CalSAWS imaging system. Implementing OCR and addressing issues upstream improves accuracy before submission to CalSAWS.

We have a proven track record, recently collaborating with the U.S. State Division of Budget to implement IDP. Using large language models (LLMs) to analyze diverse bank statements and extensive Excel files, we improved data quality and compliance, and saved over 25,000 hours of manual labor.



#### 4.3.2.1.3.3 Intelligence-driven automated and orchestrated response leveraging GenAI

We will integrate a cyberthreat intelligence feed (including GenAI capabilities) with Splunk SIEM to monitor access to the portal and apply a security orchestration, automation, and response (SOAR) solution to automatically block traffic from known malicious IPs or threat actors. We will also provide defense mechanisms when known anomalous or malicious traffic patterns are observed within the environment.

#### What it means to BenefitsCal

- ✓ **Enhanced security:** GenAI capabilities increase the team's ability to proactively identify, triage, and remediate incidents.
- ✓ **Reduced cost:** GenAI helps reduce manual steps and workload while increasing BenefitsCal security.
- ✓ **Increased optimization:** Insights provided through the detailed AI analysis of the SIEM enable the team to proactively optimize processes, system changes, and continually improve the security footprint.
- ✓ **Increased flexibility:** Increased automation allows the Security team to focus on continually improving how we secure the environment and keep up with the latest security trends.

#### What it means to BenefitsCal

- ✓ **Enhanced security:** Implementing additional tools for identity verification add another layer of validation to ensure account integrity.
- ✓ **Increased optimization:** Identity verification tools streamline the account creation and/or validation process, providing faster access securely.

#### 4.3.2.1.3.4 Identity proofing and verification

To continue deterring bad actors from accessing the portal, we recommend implementing measures around identity verification, such as a SoCure or ID.me. This will ensure that individuals establishing a session with the portal can be verified against known, government-issued records and more closely align with the NIST 800-63A identity verification requirements. We understand that these

solutions have broad-reaching impacts to the user base, and we welcome the opportunity to continue to collaborate with all stakeholders, contractors, and partners to proactively enhance the security of the portal.

#### 4.3.2.1.3.5 Comprehensive defense in depth assessment to align with zero trust

Accenture will review all avenues of environment ingress (data entering BenefitsCal system or network) and egress (data leaving BenefitsCal system or network including corporate internal workloads) to identify potential gaps in authentication (i.e., areas lacking MFA or SSO), network segmentation, continuous monitoring, endpoint security, data protection, application security, and user training awareness. We will provide holistic recommendations to bring the program closer to a zero-trust architecture.

#### What it means to BenefitsCal

- ✓ **Enhanced security:** Defense in depth and zero-trust architectures create a layered security approach with more access verification measures which reduces the attack surface and improves security.

Our experience conducting similar assessments includes work for a financial services company where we thoroughly reviewed our client's security environment—including conducting multiple deep dive workshops focused on zero-trust pillars: workforce, workplace, and workload. The project resulted in recommendations for enhancing security, improving user experiences, and lowering costs—a roadmap to a future state architecture with zero trust.

### What it means to BenefitsCal

- ✓ **Increased optimization:** With AI/GenAI and machine learning to automate code reviews and debug, the system can analyze code for potential errors, vulnerabilities, and inefficiencies in real time, reducing the time developers spend on manual tasks.
- ✓ **Increased flexibility:** By providing intelligent code suggestions and refactoring recommendations, AI-driven tools help developers quickly adapt their codebase to meet new demands.

#### 4.3.2.1.3.6 Code quality improvement/ AI-assisted coding

Artificial intelligence and ML can significantly enhance code quality and automate high-volume, repetitive, or error-prone tasks leading to increased accuracy, reduced costs, and improved user experiences. We leverage AI tools to act as powerful copilots in code quality improvement and AI-assisted coding, utilizing techniques such as static code analysis, bug detection, code completion, and automated testing to streamline development processes and ensure robust software delivery.

#### 4.3.2.1.4 Evolution roadmap

Looking ahead, we envision a clear roadmap to BenefitsCal's future, with longer-term updates and revisions to existing items, software, and processes. Through these enhancements, we will continue to increase security; reduce costs; and improve optimization, scalability, and flexibility. In Table 4.3-1, we provide a selection of enhancement ideas spanning functional areas of security, experience, and service and support. We've also identified a sampling of emerging technologies and strategic ideas for innovation—new items, software, and processes—for the BenefitsCal roadmap. We provide details for innovation ideas like Copilot + AI/intelligent prompting and a policy chatbot in UA6. We will work with your stakeholders to validate and prioritize these and other improvement opportunities in keeping with the SCR and Collaboration Model processes. The roadmap will be updated annually.

Roadmap item	Functional category	Description
<b>Business continuity resiliency/ ransomware prevention</b>	Security	Establish procedures to respond to, recover, and restore operations in the event of a potential ransomware attack. We will review existing policy, procedure, and Operational Working Documents (OWDs); implement technical measures including high-availability and immutable backup images of at-risk workloads; and perform recurring tabletop exercises to ensure personnel are aware of their responsibilities to respond to a ransomware event.
<b>One-click renewal</b>	Application experience	Streamline the application experience by reducing the steps required to apply. This can be achieved by leveraging previous



Roadmap item	Functional category	Description
		data, predictive modeling to automatically improve the questions being asked, and simplifying confirmation steps.
<b>Intelligent prompting + AI</b>	Service and support	Provide live AI assistance based on actions a user has taken on the portal, including application and/or case status.

Table 4.3-1. We envision a clear roadmap to BenefitsCal's future, with enhancements that increase security; reduce costs; and improve optimization, scalability, and flexibility.

### Key highlights of our approach

<b>Measured success</b>	<ul style="list-style-type: none"> <li>Business-focused and outcomes-driven process ensuring that we are measuring success.</li> </ul>
<b>Inclusive approach</b>	<ul style="list-style-type: none"> <li>Inclusive approach including key stakeholders and project teams throughout the process.</li> </ul>
<b>Outcomes-driven</b>	<ul style="list-style-type: none"> <li>Focused on reducing costs, improving optimization, increasing scalability, and increasing flexibility through the evolution ideas mentioned in this section.</li> </ul>
<b>Security-first</b>	<ul style="list-style-type: none"> <li>A security-first approach and mindset that incorporates security best practices in all aspects of the process—from design to deployment and monitoring.</li> </ul>
<b>Smart</b>	<ul style="list-style-type: none"> <li>Incorporating GenAI and AI into the application evolution strategy.</li> </ul>

### Key deliverables

### Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal Approach to Automation, Artificial Intelligence and Machine Learning</li> <li>BenefitsCal User Centered Design Plan and Customer Experience Report Plan</li> <li>BenefitsCal System Security Plan</li> <li>BenefitsCal Requirements Traceability Matrix (RTM) and Report</li> <li>BenefitsCal General Design Document (GDD)</li> <li>BenefitsCal Performance Test Materials Packet</li> <li>BenefitsCal Services Plan and Operational Working Documents</li> <li>BenefitsCal Marketing and Public Communications Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.</li> <li>Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.</li> <li>Application/architecture evolution and innovation including expanding data analytics capabilities to provide evidence-based outcomes.</li> <li>Continuous evolution of infrastructure and application security to reinforce robust cybersecurity measures.</li> </ul>
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### 4.3.3 UA6

Describe your approach to proactively explore, identify, analyze, evaluate technology innovations, and formulate recommendations for potential inclusion to the BenefitsCal application. Describe how you will:

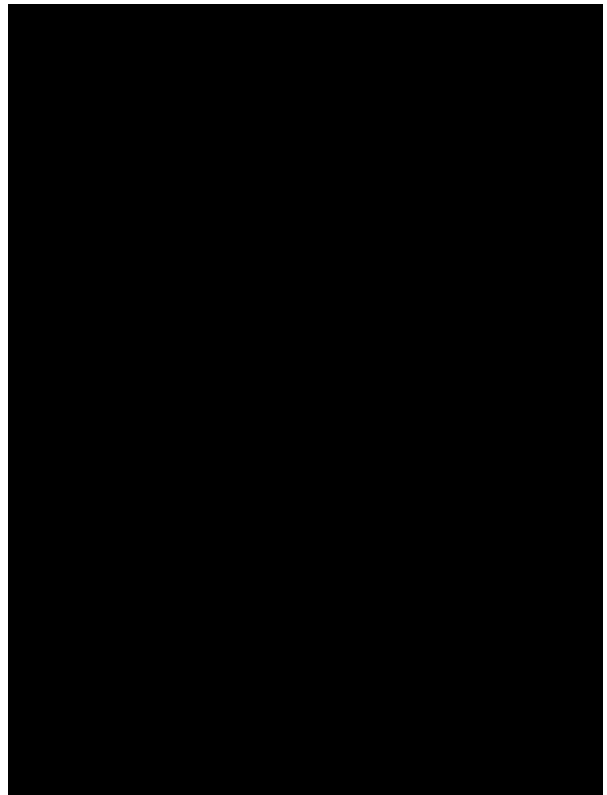
- Coordinate with the Consortium to evaluate emerging technologies,
- Propose integration of selected innovation, technologies into the CalSAWS platform,
- Evaluate value and impact to business operations and develop strategies for implementation.

We believe in co-innovation through collaboration and shared objectives, and we share your passion for driving technology innovation into the BenefitsCal application. Over the last three years, we worked with you to formalize and expand the CalSAWS Innovation Program. Although this program was put on hold during the migration period, the team immediately picked back up after migration was complete. Recently, we deployed an output of the Innovation Program—the Fresno GenAI Call Summary Assist solution. Early performance metrics show this solution bringing value through reduced average post-call wrap times and reduced average handle times, for both inbound and outbound calls. Moving forward, we will work closely with your CalSAWS M&E contractor, counties, and other stakeholders—confirming front- and back-end integration and inclusivity—as we work to implement innovative solutions that improve outcomes.

#### 4.3.3.1 Approach to technology innovation

In this section, we provide our approach to proactively explore, identify, analyze, and evaluate technology innovations and formulate recommendations for potential inclusion to the BenefitsCal application. We also describe how we will coordinate with the Consortium to evaluate emerging technologies, propose the integration of selected innovative technologies into the CalSAWS platform, evaluate the value and impact to business operations, and develop strategies for implementation. Our staffing model is designed to meet your innovation-related requirements and deliver innovations within the allocated hours.

Our proposed innovation approach for BenefitsCal leverages our extensive knowledge of the CalSAWS Innovation Program and the best practices, lessons learned, and insights gained through our work with CalSAWS. As always, we'll seek to help grow the culture of innovation, work collaboratively with the entirety of the CalSAWS partner and contractor ecosystem, and increase the scope of ideas funneled through the process.





#### 4.3.3.1.1 Innovation framework

Our proposed innovation framework includes five stages through which we will proactively explore, identify, analyze, and evaluate technology innovations, and formulate recommendations for potential inclusion to the BenefitsCal application. As illustrated in Figure 4.3-8, we will funnel ideas through each step of this framework, using evaluation and proofs of concept (POC) to measure and score each against business-driven success criteria.

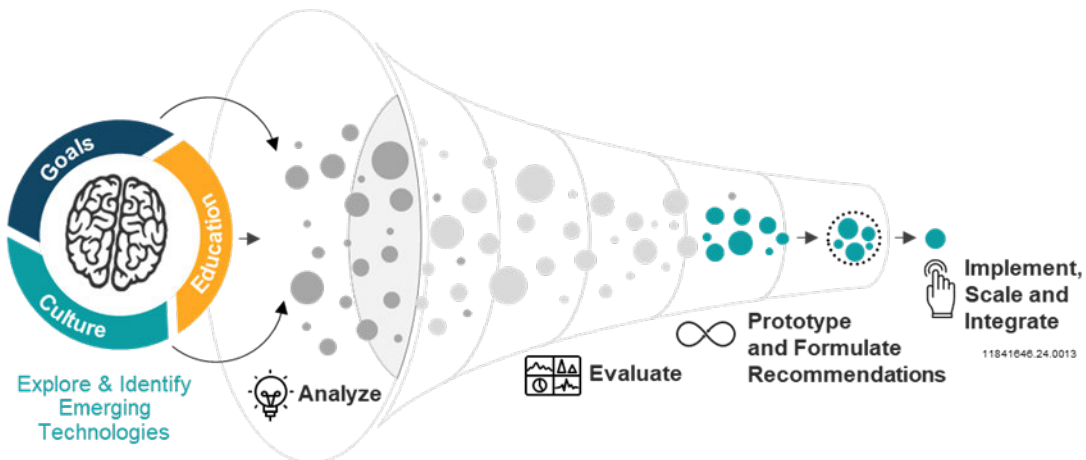


Figure 4.3-8. Accenture brings a five-stage innovation framework for BenefitsCal.

##### 4.3.3.1.1.1 Stage 1: Explore and identify emerging technologies

Innovation begins with education, learning, and discovery. Building on our knowledge and understanding of what works for CalSAWS, our innovation approach for BenefitsCal will feature opportunities to explore, identify, and learn about emerging technologies through the following three channels:

#### 4.3.3.1.1.1 Annual Innovation Day

Accenture will actively participate in this all-day opportunity for the entire CalSAWS community to share and learn about emerging and innovative technologies. We anticipate bringing the following to this annual event:

- A readout of the **annual BenefitsCal innovation report**, summarizing all the innovations explored, prototyped, and/or implemented at BenefitsCal in the prior year
- **Presentation of emerging technologies** and innovative ideas by Accenture experts and Accenture clients who are leading their industry in innovation
- **A summary of key themes, thought leadership, and innovations** presented at various industry conferences and summits (such as APHSA conferences, Harvard Summit, AWS re-invent, etc.)
- Hands-on and **immersive experiences** to explore various innovations at Accenture's San Francisco Innovation Hub

Following each Annual Innovation Day, we will bring applicable ideas and technologies presented into Stage 2 of our BenefitsCal innovation framework for further analysis.



#### 4.3.3.1.1.2 Quarterly Innovation Challenges

In 2021, the Consortium and Accenture co-created the Quarterly Innovation Challenge Program—based on the popular Shark Tank television show—to formalize our innovation approach within CalSAWS. This program won the 2022 ISM Award for Best Collaboration Across Boundaries by the American Public Human Services Association (APHSA). As the BenefitsCal M&O contractor, we will participate in this challenge, designed to solve direct challenges facing California counties. We will collect applicable ideas submitted through the challenge and bring them forward into Stage 2 of our innovation framework for further analysis.



As a commitment to the ongoing success of the CalSAWS Innovation Program, Accenture will continue funding a subset of POCs selected as part of the Quarterly Innovation Challenge each year.



#### 4.3.3.1.1.3 Open innovation channels

Innovative organizations don't limit innovation to a single innovation day or quarterly events, and neither will BenefitsCal. Accenture will incorporate open innovation channels through which any member of the CalSAWS community and the public will be able to submit innovative ideas to improve a business process, system function, or an aspect of the BenefitsCal solution. We propose adding a CalSAWS ServiceNow Idea Portal for users to submit, vote, and comment on ideas. We also propose adding a link to the BenefitsCal Portal to make it easy for users, advocates, and CBOs to submit innovation and improvement ideas. The entire stakeholder community can submit ideas via these channels at any time.

Additionally, we will work with the Consortium to conduct county site visits and an annual survey of county staff to collect improvement opportunities and submit innovation ideas based on user feedback collected. We will collect the ideas submitted through all open innovation channels, bringing relevant ideas forward into Stage 2 of our BenefitsCal innovation framework for further analysis. During Transition-In, we will work with the Consortium to fully align the process and tools across all contractors.

### Accenture named a leader in The Forrester Wave: Innovation Consulting Services, Q2 2024 report.

The report recognizes us for:

- ✓ Driving business reinvention with repeatable playbooks and proprietary IP.
- ✓ Offering a full suite of innovation services with multidisciplinary teams, paired with a deep partnership ecosystem.
- ✓ Continuing to invest in accelerator assets and emerging tech (e.g., gen AI, quantum, space tech and bio innovation) to speed up related innovation for client organizations.
- ✓ The report notes that "Accenture maintains the largest network of innovation labs among the companies in this assessment, offering a diverse set of prototyping capabilities, supporting clients in ideation and experimentation phases."

#### 4.3.3.1.1.2 Stage 2: Analyze

As innovation ideas are generated and collected, we will categorize ideas, combine similar ones, and do a preliminary analysis of each idea. This analysis will include a rough estimate of the effort needed to implement POCs (including potential scaling costs if successful), additional software/hardware needs, overlap with existing or planned functionality, a preliminary business case, and initial merits of each idea.

On a periodic basis, and during each Quarterly Innovation Challenge, we will prepare a summary of this analysis for further evaluation by the Consortium Innovation team as part of Stage 3 of our innovation framework. This summary will also include data collected via the CalSAWS ServiceNow Idea Portal and the BenefitsCal Portal link.

#### 4.3.3.1.1.3 Stage 3: Evaluate

**In coordination with the Consortium, we will evaluate emerging technologies.** Our process involves working with the Consortium to jointly establish key focus areas for innovation and scoring criteria centered on value and impact to business or technical operations, including integrations to CalSAWS that may require other contractors' participation. As described in Stage 2: Analyze, on a periodic basis, and during each Quarterly Innovation Challenge, we will work with the Consortium Innovation team to evaluate each idea



against these criteria and select which will move forward in the innovation process. Evaluation criteria will consist of available funding, cost effectiveness, business value, feasibility to prototype in six to eight weeks, and alignment with Consortium strategy and other priorities. We will measure ideas against all criteria on a scale of high, medium, or low, with a respective number ranking for each. If necessary, we will also solicit input from the Joint Powers Authority (JPA) Board and/or Project Steering Committee (PSC). The applicable business value measurement will be unique for each idea, so we will co-create this measurement for each. Once we have evaluated, prioritized, and selected the top-ranking ideas, we will clearly define success criteria (exit criteria) for each as they head into Stage 4 for prototyping.

#### 4.3.3.1.4 Stage 4: Prototype and formulate recommendations

The goal of the prototype phase is to gather the data needed to **evaluate the value and impact to business/technical operations and help develop strategies for implementation**. For ideas selected to prototype, we will estimate the solution effort using people within our Accenture network with experience on similar projects. We will assemble an Accenture POC team comprised of relevant experts to execute the POC. Additionally, we will involve the infrastructure team and others as necessary across the ecosystem to thoroughly plan and execute the POC. For example, if we are planning a POC using a new software product, we will work with the Consortium Architecture/Security team and the CalSAWS infrastructure and M&E contractors to evaluate and estimate the infrastructure and M&E changes required to complete the POC and incorporate it into the overall solution.

As part of the POC process and in coordination with the Consortium, we will define the need and representative user population most appropriate for pilot tests. The pilot county or counties, scope, schedule, and activities (including UX testing) will be based on the scope and complexity of the innovation initiative.

Additionally, we will leverage the Accenture Amazon Business Group (AABG) to help conduct and fund POCs. The AABG combines the resources, technical expertise and industry knowledge of Accenture and AWS, all through a single team. This collaboration supports our clients end to end, securely and at scale, and powered by AABG's joint investments in world-class accelerators, innovation initiatives, and digital skills.

#### Through the CalSAWS Innovation Program, we brought robotic process automation (RPA) to achieve measurable outcomes

To save time for contact center agents and callers in San Bernardino County, our team developed two automated robot tools—one for authentication (AuthBot) and another for natural language understanding (NLU WelcomeBot)—both integrated with the system's existing IVR.

##### Project outcomes and value delivered:

- 1-minute average time reduction per agent per call, and 47,000 agent hours saved per year
- 47 full-time equivalents (FTEs) provided by AuthBot, WelcomeBot, and push notifications

Along with the Consortium, we will clearly define success criteria (exit criteria) for each prototype. We will also seek contribution and approval from key CalSAWS stakeholders as part of the exit criteria. Our POC team will execute and complete the prototype project through the SCR process within the prescribed six-to-eight-week timeframe, including data

discovery, weekly Scrum activities, a midpoint review, and final readout. Where applicable, we will work with the counties and other BenefitsCal stakeholders to create workgroups and involve these parties in design thinking sessions as part of our inclusive, collaborative process.

As a final step before entering Stage 5, we will work with the POC team to formulate a recommendation for each idea/prototype based on the exit criteria, lessons learned, outcomes/value delivered by the POC and if applicable, a projected return on investment (ROI). We will work with the Consortium to review the value and impact to business operations of each POC, using our jointly-defined success criteria and ROI calculation based on business need.

#### 4.3.3.1.1.5 Stage 5: Implement, scale, and integrate

After the completion and final disposition of each POC, the final stage of our innovation framework will **integrate approved innovation technologies into the CalSAWS platform**. For POCs approved for scaling, we will coordinate with the appropriate contractors, teams, and stakeholders to develop strategies, estimates, and implementation plans for integrating into the CalSAWS platform. The estimates will account for one-time implementation costs as well as any ongoing maintenance costs. We will also work with the infrastructure and M&E contractors to account for additional services, software, hardware, and cloud-hosting costs.



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The final comprehensive proposal for scaling each approved prototype will be presented to the Consortium Innovation, Finance, and Executive teams for final review and approval. We will work with the Consortium PMO team to identify funding sources or incorporate into future funding requests (IAPDUs). When funding is available and allocated, the appropriate team will then submit the SCR and implement the project.

#### 4.3.3.1.2 Innovation framework implementation timeline

We are ready to begin innovating for BenefitsCal on Day 1 of the Transition-In period, as illustrated in Figure 4.3-9. We will bring drafts, ideas, and plans—inputs for the BenefitsCal Services Plan and Operational Working Documents—ready to review with you and finalize over the first three months. We will also deliver the **BenefitsCal Approach to Automation, AI and Machine Learning**. The proposed implementation timeline for innovation activities is based on requisite participation from both the Consortium and other contractors for dependent activities.

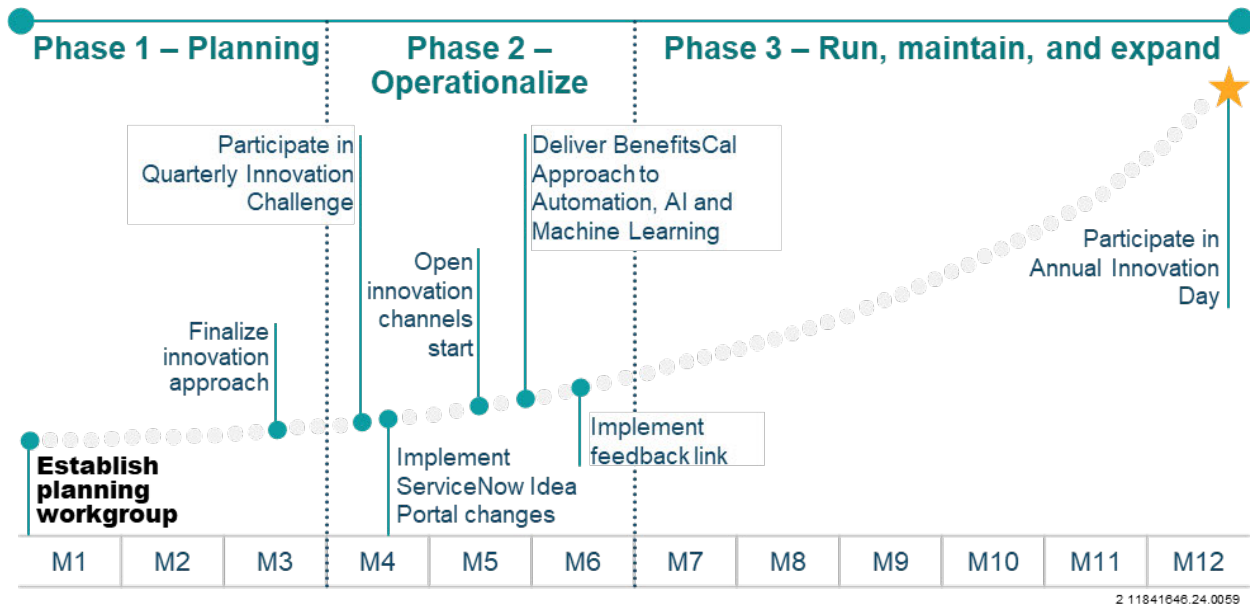


Figure 4.3-9. We are ready to begin innovation activities at BenefitsCal on Day 1.

#### 4.3.3.1.3 Innovation roadmap

With our understanding of the current BenefitsCal application, the underlying systems that support it, and our existing work with the CalSAWS Innovation Program, we have already identified innovation ideas that will improve outcomes for BenefitsCal stakeholders. We worked with the Accenture Innovation Network, Accenture eligibility subject matter advisors (SMAs), Accenture technology SMAs, and contractor partners to identify a sampling of ideas specific to the BenefitsCal ecosystem.



In Table 4.3-2, we detail ideas and technology for inclusion in the BenefitsCal innovation roadmap. This roadmap supports BenefitsCal's future vision and the CalSAWS Annual Strategic Plan. It encompasses a five-year planning window with innovations designed to keep BenefitsCal relevant over the life of the contract. We include a range of easier and more complex solutions and recognize that some will require extensive discussion and coordination with the State. With each innovation, we seek to empower BenefitsCal's mission—helping those who need benefits to get them sooner, supporting counties to process applications faster, and enabling stakeholders to make the right decisions for better outcomes.

Roadmap item	Functional category	Description
<b>Proactive communications</b>	Communications/ outreach/content	Map the points in the process where reminders/two-way communication can improve the interactions and user experience, providing two-way communications, updates, and direction to the user on their required actions. We provide additional details in Section 4.4–UA9.
<b>Policy chatbot</b>	Communications/ outreach/content	Chatbot for CBOs and the public for easier access to answers about policy and eligibility rules.
<b>GenAI for translation</b>	Communications/ outreach/content	Supplement native speaking workers with GenAI for smoother, faster language translation.
<b>Electronic and web-based communication for public relations</b>	Communications/ outreach/content	Develop, implement, and plan for the use of electronic and web-based communication for the implementation of public relations strategies; using current and emerging technologies to best reach target audiences.
<b>Copilot + AI/intelligent prompting</b>	Application experience/ service	Leverage data analytics and AI to provide a copilot (AI assistant) to help the user through the application process. Use contextual and situational-based information/data to guide the journey.
<b>Live chat</b>	Application experience/ service	Enable users to seamlessly move from AI-assisted copilot or chatbot to a live agent by asking for live chat assistance. Explore options for Accenture staffing of live chat agents to reduce burden on county workers.
<b>Document processing assistant</b>	Application experience/ service	Expand the intelligent document processing enhancements described in UA5. Use data-driven results to drive further enhancements for extracting information from submitted documentation, reducing data entry times.
<b>GenAI+ bot, copilot, verification</b>	Application experience/ service	Improve chatbot to help complete tasks associated with applications and/or cases that completes end-to-end actions and updates the appropriate information based on the assisted flow.
<b>Digital EBT card</b>	Other	Create a digital EBT card (e.g., Apple Wallet)

Table 4.3-2. We bring an innovation roadmap for CalSAWS on Day 1.

#### 4.3.3.1.4 Tools and technology

We will continue to host collaborative design thinking sessions as part of our BenefitsCal innovation framework. These can occur in person and can also be conducted virtually, when appropriate.

Design thinking sessions solicit and capture input from a range of interested parties—users, counties, advocates, CBOs, State partners, CWDA, SEIU, the Consortium, system developers, policymakers, and more—to shape the direction and goals of the innovation journey.

As part of our innovation framework for BenefitsCal, we will bring the tools and activities detailed in Table 4.3-3 to facilitate ideation, collaboration, and improvement.

Tool/activity	Features and benefits
<b>Design thinking sessions</b>	These facilitated, multi-disciplinary group meetings promote brainstorming and planning for innovation, user-focused design, and creativity to improve product and processes.
<b>Security innovation workshops</b>	On a semi-annual basis, Accenture will conduct workshops with BenefitsCal stakeholders and cybersecurity SMEs to cover various emerging cyber topics, which can include domains such as GenAI, emerging threats and technologies, zero trust, DevSecOps, compliance, and more.
<b>Feedback link</b>	Link on BenefitsCal through which users, advocates, CBOs, and others can submit feedback.
<b>ServiceNow Idea Portal</b>	<p>This tool enables the following capabilities:</p> <ul style="list-style-type: none"> <li>• View, submit, vote, and subscribe to ideas</li> <li>• Collaborate using comments to discuss and exchange information about ideas</li> <li>• View idea details, ask/answer questions, and exchange information about ideas using comments to maintain a discussion trail; help identify key contributors for an idea, or reasons for its success/failure</li> <li>• Manage submitted ideas</li> <li>• Review and evaluate submitted ideas</li> <li>• Assess the popularity and demand of an idea from the number of votes</li> </ul>
<b>Maturity quiz</b>	This quiz measures the maturity of the Innovation Program, providing insight and metrics to guide improvement.

Table 4.3-3. We bring tools and activities to foster collaboration and creativity while measuring impact.



### Key highlights of our approach

<b>Smart, aligned innovation</b>	<ul style="list-style-type: none"> <li>A collection of innovation ideas ready on Day 1, providing faster value realization from innovation in alignment with the CalSAWS Annual Strategic Plan and BenefitsCal future vision.</li> </ul>
<b>Collaborative, inclusive process</b>	<ul style="list-style-type: none"> <li>Enhanced focus on collaboration and inclusion: Working with and accepting ideas and support from the Consortium, your contractors, the public, and other stakeholders throughout the innovation process creates a more inclusive, innovative culture.</li> </ul>
<b>Best-in-class innovation</b>	<ul style="list-style-type: none"> <li>Integration with Accenture's broader Innovation Network: BenefitsCal stays best-in-class by continuing to get the best of Accenture.</li> </ul>
<b>Vision-aligned innovation</b>	<ul style="list-style-type: none"> <li>We are ready to start innovating with our innovation roadmap that supports BenefitsCal's future vision and the CalSAWS Annual Strategic Plan.</li> </ul>

### Key deliverables

- BenefitsCal Approach to Automation, Artificial Intelligence and Machine Learning

### Alignment to the Consortium's vision

- Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.
- Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.
- Application/architecture evolution and innovation including expanding data analytics capabilities to provide evidence-based outcomes.
- Continuous evolution of infrastructure and application security to reinforce robust cybersecurity measures.
- Expand and further refine user-centered design (UCD) and the user experience (UX) within the software development process.
- Enhance communications and marketing to increase visibility and outreach for the public, counties, and CBOs.

## 4.3.4 UA7

Describe how you will participate with and support the existing CalSAWS Innovation Team relative to your overall Innovation strategy.

### 4.3.4.1 Supporting the existing CalSAWS Innovation team

As we look forward to the next iteration of BenefitsCal, participation with and support of the existing CalSAWS Innovation team is central to our innovation strategy and approach.

Our experience working with the CalSAWS Innovation team, including on the Shark Tank initiative while the program was active, exemplifies our support of CalSAWS.

### Key Success Factors

**The CalSAWS Innovation team is central to our strategy, serving as key decision-makers at every point:**

- ✓ Vision and goals
- ✓ Events
- ✓ Innovation challenges
- ✓ Evaluating and approving new ideas for POC and implementation

Through coordinating Quarterly Challenge topics with key stakeholders, managing and coaching selected idea teams presenting to the directors, and scaling selected ideas into production, we demonstrated our commitment to working with you and established a level of trust we can continue to build as we bring innovations to BenefitsCal.

Our participation with the Innovation team, including the technical director, has proven valuable as most of our innovations to date involved technical aspects. This relationship enabled an important first layer of approval to send ideas through the innovation funnel. We recognize the critical need to continue working closely with the Innovation team as we propose innovative solutions for BenefitsCal—particularly as we confirm integration between the front-facing portal and the back-end systems it relies on.



Inclusivity is a cornerstone of our innovation strategy, with ongoing touchpoints to confirm our efforts are aligned with your team's vision, goals, and efforts at every step. In parallel, every phase and activity within our innovation framework also provides touchpoints across BenefitsCal stakeholders and the multi-contractor CalSAWS organization, promoting a true culture of innovation and collaboration.

In Table 4.3-4, we detail how we will work with and support the CalSAWS Innovation team throughout the stages of our BenefitsCal innovation framework and its activities.

Innovation stage	Activity	CalSAWS Innovation team touchpoints
Explore and identify	<b>Annual Innovation Day</b>	Participate in Innovation Day activities and align with the goals and planned outcomes of the Annual Innovation Day.
	<b>Quarterly Innovation Challenge</b>	Actively participate in the Quarterly Innovation Challenge.
	<b>Open innovation channels</b>	Review and evaluate ideas gathered via open innovation channels and seek approval from the CalSAWS Innovation team to begin preliminary analysis.
	<b>Education on emerging technologies</b>	As we conduct our research and analysis of emerging technologies, we will bring the necessary experts to educate the CalSAWS Innovation team on the latest and greatest technology trends.
Analyze	<b>Analyze</b>	Share preliminary analysis (including rough estimates for POC, additional hardware/software needs, functionality overlaps, and merit) of ideas with the CalSAWS Innovation team.
	<b>Review</b>	We will work with the Consortium Innovation team to review the data gathered as part of Stage 2: Analyze to collect feedback on the ideas submitted and suggest updates to the process as needed.
	<b>Identify pilot county/counties</b>	Determine the representative user population most appropriate for pilot tests of new BenefitsCal innovation concepts. The pilot county/counties, scope, schedule, and activities will be based on the scope and complexity of the innovation initiative.


Innovation stage	Activity	CalSAWS Innovation team touchpoints
<b>Evaluate</b>	<b>Evaluate ideas</b>	Work with the CalSAWS Innovation team to develop the scoring criteria that all ideas will be scored against and score each idea to determine which will advance to the Innovation Challenge pitches and/or prototyping phase.
	<b>ROI metrics</b>	Work with the CalSAWS Innovation team to establish ROI metrics for each idea.
	<b>Reporting/ dashboards</b>	Analyze reports and dashboards to measure usage, user feedback, usability, and ensure solutions are meeting the Consortiums goals and vision.
<b>Prototype and formulate recommendations</b>	<b>Evaluate ROI</b>	Work with the CalSAWS Innovation team, Consortium leadership, and BenefitsCal stakeholders to prioritize POCs through the evaluation of ROI outcomes.
	<b>Approvals</b>	We will clearly define success criteria (exit criteria) for each prototype in conjunction with the CalSAWS Innovation team. We will seek approval from key CalSAWS stakeholders as part of the exit criteria. Our POC team will execute and complete the prototype project through the SCR process and will conduct a midpoint review and final readout with key stakeholders.
	<b>Prototype approach</b>	Work with the CalSAWS Innovation team, idea submitters, counties, and other BenefitsCal stakeholders as required to develop the prototype approach.
<b>Implement, scale, and integrate</b>	<b>Evaluate success</b>	Work with the CalSAWS Innovation team to measure and evaluate success and approve exit criteria.
	<b>Implement/ scale approved ideas</b>	Work with the CalSAWS Innovation team, idea submitters, counties, and other BenefitsCal stakeholders as required to present results and recommendations to scale.
	<b>Cross-team collaboration</b>	Once ideas are approved for scaling, we will coordinate with the appropriate contractors, teams, and stakeholders to develop strategies, estimates, and implementation plans for integrating into the CalSAWS platform. We will also work with the infrastructure and M&E contractors to account for additional services, software, hardware, and cloud-hosting costs. All of this information is reviewed with the CalSAWS Innovation team prior to starting the next step.

Table 4.3-4. Our innovation framework supports and engages the CalSAWS Innovation team in every stage.

Moving forward in our work together, we will continuously improve our support of the existing CalSAWS Innovation team by embedding them in our innovation process, as we have described throughout this section. This collaboration will enable the CalSAWS Innovation team to suggest changes in processes or activities early on, and to continuously provide candid feedback on how our approach can be improved. We will

conduct quarterly retrospective sessions with the CalSAWS Innovation team to evaluate activities and outcomes, and brainstorm ideas for the innovation path ahead.

As part of our approach, we will work with the CalSAWS Innovation team to align on the core mission and vision of the CalSAWS program. We will incorporate this into our overall process and regularly seek guidance on how well the Innovation Program is aligning to these goals. Through this close partnership, we will continually update and align our team, processes, and strategy to help improve the services provided to the public, counties, and the Consortium.



### Key highlights of our approach

<b>Inclusive culture</b>	<ul style="list-style-type: none"><li>• Participate with and support the existing CalSAWS Innovation team by creating an inclusive culture, process, and transparency.</li></ul>
<b>Continuous improvement</b>	<ul style="list-style-type: none"><li>• Continuous improvement mentality that we will bring to the CalSAWS Innovation team.</li></ul>

### Key deliverables

- BenefitsCal Approach to Automation, Artificial Intelligence and Machine Learning

### Alignment to the Consortium's vision

- Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.
- Application/architecture evolution and innovation including expanding data analytics capabilities to provide evidence-based outcomes.



## 4.4 – Understanding and approach to user experience, marketing and public communications

### 4.4.1 Understanding and approach overview

With the launch of the BenefitsCal Portal, you've given residents, community-based organizations (CBOs), advocates, and other stakeholders a new way to apply for benefits, check application status, receive information, and communicate with BenefitsCal. Yet, having built it, there's no guarantee that those who rely on BenefitsCal for the assistance they need, will come. That's where public communications and marketing come in—to drive awareness, increase adoption, and improve public perception—with the goal of ensuring that Californians come to the BenefitsCal site, and continue coming back, to receive support and the benefits they need and deserve.



As we assess the current state of awareness and adoption at BenefitsCal, we note the following:

**Awareness:** The percentage of active beneficiaries who are not using BenefitsCal is much too high. For example, only 25 percent of those eligible for Medi-Cal and just 45 percent of those eligible for CalWORKS/CalFresh have a BenefitsCal account. We need to understand why eligible beneficiaries are not coming to the site and take steps to increase engagement.

**Adoption:** The adoption level of the benefits themselves is much lower than the national adoption rate. A recent report from Nourish California estimated 2.7 million Californians are eligible for CalFresh but not receiving benefits. Outreach and marketing can help boost awareness, and BenefitsCal can make the application process simple and easy, so users understand their eligibility for Medi-Cal, CalFresh, and other cash programs.

Moving forward, you have the opportunity to do better—through enhancing BenefitsCal's marketing and outreach efforts and improving experiences for both users and counties. The team that takes on communications, marketing, and Stakeholder engagement, as part of BenefitsCal M&O—must understand the needs of your users and stakeholders—and be responsive to the diversity of California's 58 counties. They must also understand the complexity of your end-to-end environment. Only with this understanding, will you be enabled to promote awareness and adoption today—and in the future, as the portal and processes evolve. Importantly, to drive your desired outcomes, your team must also continue to build trust. Residents need to know that their personal information will be kept secure, and benefits will be available when they're needed.



Accenture is the right partner to join your efforts to improve outcomes for Californians. With our years of experience at CalSAWS, we understand your stakeholders, environment, and systems—and the need for collaboration and integration among them. Through Accenture Song—the world's largest technology-powered creative group—we provide communications and marketing services—including user experience expertise, world-class creative, and intelligent marketing performance. The combination of Song, together with our technology, strategy and consulting, and operations groups, enables us to provide unified and consistent messaging, stakeholder engagement, and integrated solutions that address the BenefitsCal experience, functionality, and vision from end to end.

We have a strategy for marketing, communications, and enhancements that will lead to a successful future. With a focus on collaboration; relevant, transparent communication; and an audience-first approach that applies user-centered design (UCD), we'll bring all stakeholders along on the journey as we work together to empower BenefitsCal's mission—getting benefits to those who need them, now and for the long term.

We'll meet stakeholders where they are with personalized journeys and multi-channel options like social media, posters, landing pages, and more—with specific tactics to be defined in the planning process. Stakeholders will be involved in the end-to-end process—from creation, through implementation and training, to measurement of our efforts against established key performance indicators (KPIs). We'll also bring secure, smart, enhancements to make BenefitsCal easier for residents to use, and easier for county workers as they process applications—working together to improve user experiences and outcomes—and leading to greater adoption and improved opinion.

#### 4.4.2 UA8

Describe your approach to engaging the counties, CBOs, State Partners, and Stakeholders, as appropriate, to enhance the integration of the BenefitsCal application with the County processes.

##### 4.4.2.1 Approach to engaging all stakeholders to enhance the integration of the BenefitsCal application with the county processes

As we work together to move BenefitsCal forward, integration of the application with county processes is essential to ensuring both users and county workers are supported. Accomplishing this requires an understanding of the tight integration between the BenefitsCal Portal, CalSAWS systems, ForgeRock, and Hyland Imaging—something Accenture knows well. Critically, it also requires an understanding of the processes, policies, needs, expectations, and desired outcomes of BenefitsCal Stakeholders—users, county workers, CBOs, State partners, and others. We have a plan for continuous stakeholder engagement that will lead to improved outcomes for all.

Following, we detail our understanding of your current state, including what we believe led to situations where a disconnect occurred between the application and county processes. We outline our guiding principles for enhancing integration through stakeholder

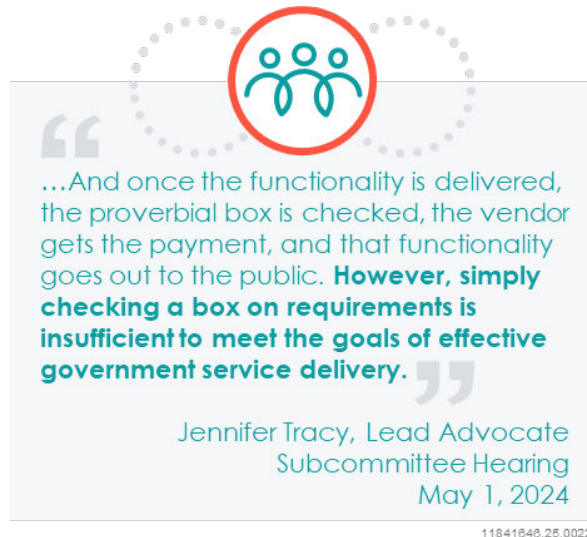
engagement. And we share our engagement approach, applying the UCD model to confirm continuous participation throughout the process.

#### 4.4.2.1.1 Understanding the current state

To better understand the current state of BenefitsCal's integration with county processes, we attended board meetings, talked with BenefitsCal stakeholders, and mined social media. We heard that while there is a strong foundation in place with the Collaboration Model, more can be done to enhance integration and support all stakeholders.

The current challenges largely stem from a lack of holistic, end-to-end thinking and intermittent stakeholder participation. As front-facing changes are considered, there is not sufficient consideration for the back-end systems and processes that enable and align with front-end functionality. This has caused increased burden on county workers, inefficiencies, questions about timelines and roadmaps, rollback of enhancements in late development stages, and difficulties at the county level adjusting to BenefitsCal changes. Our assessment of what led to the disconnect between the BenefitsCal application and county processes includes the following current problems:

- **A check-the-box approach:** Through attending public hearings and listening to advocates, we understand the current design processes feel to some as if there isn't comprehensive thought behind BenefitsCal functional changes and their delivery—someone is just “checking a box on requirements.” As an example, missing contact information in an application, results in counties being unable to easily reach the applicant to schedule an interview and complete the application process. This adds additional processing time and increases workloads at the county level.



- **Lack of a feedback loop:** Current reporting of metrics does not provide context into what the numbers mean. Instead of providing clarity on application trends or enabling insights, the current process provides high-level numbers, and stakeholder community groups have expressed their frustration. In the July 2024 Joint Powers Authority (JPA) Board of Directors call, for instance, stakeholders said they don't know the outcome of development efforts or the effectiveness of enhancements and marketing campaigns, because current reporting isn't looking deep enough.
- **Counties left out of the design process:** Counties are brought in at the early discovery stage, and again during testing—after a design is complete. From what we've witnessed, too often solutions designed for a real user issue have not considered the impact of that design on existing county processes and technology. This is a costly mistake, with design, development, and testing time wasted. For example, the recent Time Clocks enhancements went through a long design and development process before being pulled by counties with escalation during the County Validation phase. This wasted valuable resources and time and caused frustration for everyone involved.

#### 4.4.2.1.2 Guiding principles to improve integration

To address the current issues, and enhance integration between BenefitsCal and county processes, we'll take a more innovative approach to building a holistic, inclusive process. This will entail shifting the way we engage users, counties, CBOs, State partners, and other stakeholders throughout the stages of the UCD process. As described in Section 4.2–UA3, these processes will be led by the User Centered Design Lead, in coordination with the Public Communications Lead. The following principles will guide their work to improve integration with county processes:

##### 4.4.2.1.2.1 Integrated, end-to-end thinking



Understanding that the application process doesn't stop when a user hits "submit," we'll take an end-to-end view of BenefitsCal improvements—considering both front-end aspects of the portal and the back-end integrations that enable its functionality. Looking at how people, processes, and technology work together, we'll address issues of usability and accessibility holistically—making it easy for county workers to do their jobs and for users to get information, check status, and apply for benefits. In this way, we'll confirm the changes we make go beyond checking requirements off a list. Instead, we'll ensure updates work end to end, to the benefit of users and county workers alike. When advocates and other stakeholders share issues they're experiencing with BenefitsCal, or identify changes they'd like to see, we'll again apply a holistic approach—listening, gathering information, and then conducting research to identify the root cause of the issue. We'll consider the full picture of what their requested changes mean for back- and front-end systems and for other stakeholders, CalSAWS contractors, the Delivery Integration (DI) team, and others, and we'll work with State partners to understand policy implications.

##### 4.4.2.1.2.2 Commitment to achieving shared outcomes and continuous, transparent communication



Our commitment to end-to-end experience improvement must be reflected in the outcomes we measure and the ways we communicate. Working toward common outcomes ensures that BenefitsCal, stakeholders, and Accenture are aligned in our objectives. It fosters a collaborative environment where all parties are committed to shared success—in this case, that means delivering an efficient application process and getting benefits to Californians quickly.



In Figure 4.4-1, we illustrate how our overarching goal will be broken down into objectives; and how these objectives will be further broken down into key performance indicators (KPIs). In this way, we align on a mission-based goal, and translate that into something measurable—targets we can work toward and against which we can assess our collective progress. During Transition-In, we will align with the Consortium, counties, advocates, and other stakeholders on goals, objectives, and KPIs. These metrics will be reflected in the **BenefitsCal User Centered Design and Customer Experience Report Plan**, and updated throughout the program as changes are necessary.

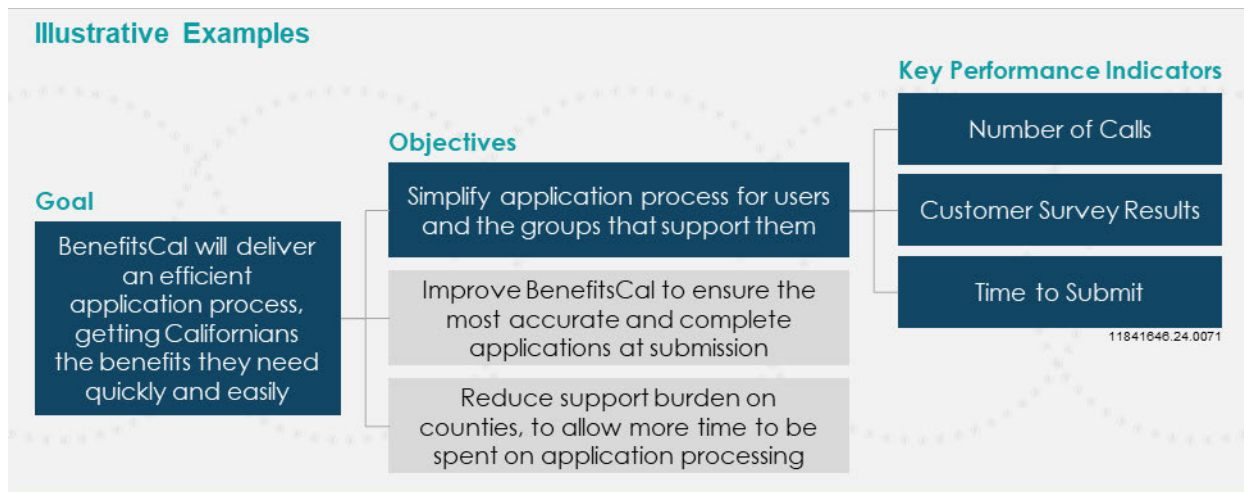


Figure 4.4-1. Together, we will align on a mission-based goal—then break it down to objectives and KPIs, against which we will assess our shared progress.

Importantly, transparent communication and a continuous feedback loop will underpin our outcomes-focused work. We will communicate effectively—early and often—regarding the work we are delivering, setting a standard of complete transparency and building a strong foundation of trust between stakeholders, CalSAWS contractors, the Consortium, and Accenture. Key aspects of our plan for effective stakeholder communication include the following:

- **Metrics that matter:** Through dashboards, reports, and other channels, we will use data analytics, data mining, and our reporting and usage monitoring capabilities to share information and meaningful metrics with external stakeholders. This will help them understand the effectiveness of enhancements and activities—including identifying what's working well and areas for improvement. Accenture will provide data, and supporting back-up detail, including metrics used to gauge the success of the user experience, performance indicators and outcomes, website usage and usability targets, and targeted objectives, as requested by the Consortium.
- **Data and information sharing:** We will emphasize more data and information sharing to stakeholders throughout the process, building trust and ensuring alignment.
- **Articulation of roadmap initiatives:** Beginning early in the process, we will clearly articulate details regarding key initiatives, providing a roadmap for counties who depend on early communication to align their processes in preparation for innovations, new features, or functionality. When stakeholder requests cannot be met due to technical or legislative constraints, we will clearly communicate this to relevant parties. In our experience, frustration builds when information is lacking.

#### 4.4.2.1.2.3 Stakeholder inclusivity throughout the process



Each of BenefitsCal's stakeholders offers unique insights and expertise that contribute to creating and implementing effective, efficient experiences for users, county workers, and others. We fundamentally believe that by working together, we'll get to better answers. Stakeholder inclusivity is infused throughout our process—with steady participation and engagement of key groups from Discovery, through Design and Build, to Measurement. We know that when

stakeholders see their input, needs, and expectations being considered and met where possible, trust builds, and long-term relationships are fostered.

In collaboration with the Consortium, counties, State Partners, and other stakeholders, we will conduct user research to understand the needs and goals of target users and other stakeholders. We'll engage in social listening and will establish regular co-creation workshops to gather feedback and insights. Our engagement approach will leverage the diversity of BenefitsCal's stakeholders, including:

- **Users:** User sentiment and user behavior are primary signals we'll use to improve BenefitsCal. Through a variety of methods such as 1:1 interviews, observation, diary studies, social listening, surveys, and web analytics—we form a deep understanding of our diverse user base. In Section 4.2–UA2, we detail our approach to user research and describe how we ensure we gain diverse perspectives, even from hard-to-reach populations, to enable equitable access of benefits through BenefitsCal.
- **Counties:** We will engage counties throughout the process, including in the Design and Build stages. Accenture will work with the Consortium to define the need for a CalSAWS County Validation (CCV) phase and will make recommendations for the integration of a CCV into the testing schedule. County trust will be built through the provision of ongoing updates, clear roadmaps, and the articulation of constraints or rationale for decisions.
- **Advocacy groups:** Advocacy groups are close to users. They will provide critical insights in all stages of the UCD process. We will establish regular workshops to understand their perspectives and meet these groups with empathy. Our experience engaging with advocacy groups tells us that communication and transparency create positive and trusting relationships.
- **CBOs:** CBOs offer valuable insight into the key challenges and opportunities faced by users from both an awareness and a usability perspective. Because they are close to some of the most vulnerable users, CBOs provide essential information that we will incorporate in our early Discovery stages. During the Build stage, they can serve as testers. Re-engaging in Measurement, CBOs will provide insights towards optimization and clarity of future improvements.
- **State partners:** State partners are essential to our success due to their understanding of policy and residents. We will confirm that State partners are involved throughout the process to provide clarity on policy constraints and considerations.
- **CalSAWS contractors:** Our contractor partners have specialized knowledge that we can use to understand technical constraints of the current system, and to help solve application and process integration challenges. We will engage contractors as key stakeholders, particularly in early stages of research and Discovery to ensure we solve client and county experience challenges with solutions that are technically viable and do not introduce any additional security risk.

#### 4.4.2.1.3 An innovative approach for continuous stakeholder engagement: applying the UCD model

Our BenefitsCal stakeholder engagement model is guided by inclusivity and UCD. To drive collaboration and participation from all stakeholders, we will apply the same process that drives our UCD and application evolution processes, as detailed in Sections 4.2 and 4.3, respectively. The process is built on a feedback loop—a continuous cycle that ensures stakeholder alignment throughout the process. Our most important change is how and



when we engage stakeholders—with more frequent input and more regular communications. A key to our doing this successfully is through more robust measurement, aligned to clear objectives.

In Figure 4.4-2, we detail the stages of our engagement model and provide our initial, high-level thoughts on the stakeholders and methods for engaging them in each stage. We aim to better align our activities to serve your diverse audiences, including those who speak languages other than English. During Transition-In, we will work with BenefitsCal to develop this model further, building on your knowledge and that of counties, advocates, CBOs, and other stakeholders. Transparency and trust will underpin this process. We know that partners criticize what they don't understand; clarity will be key from Day 1.

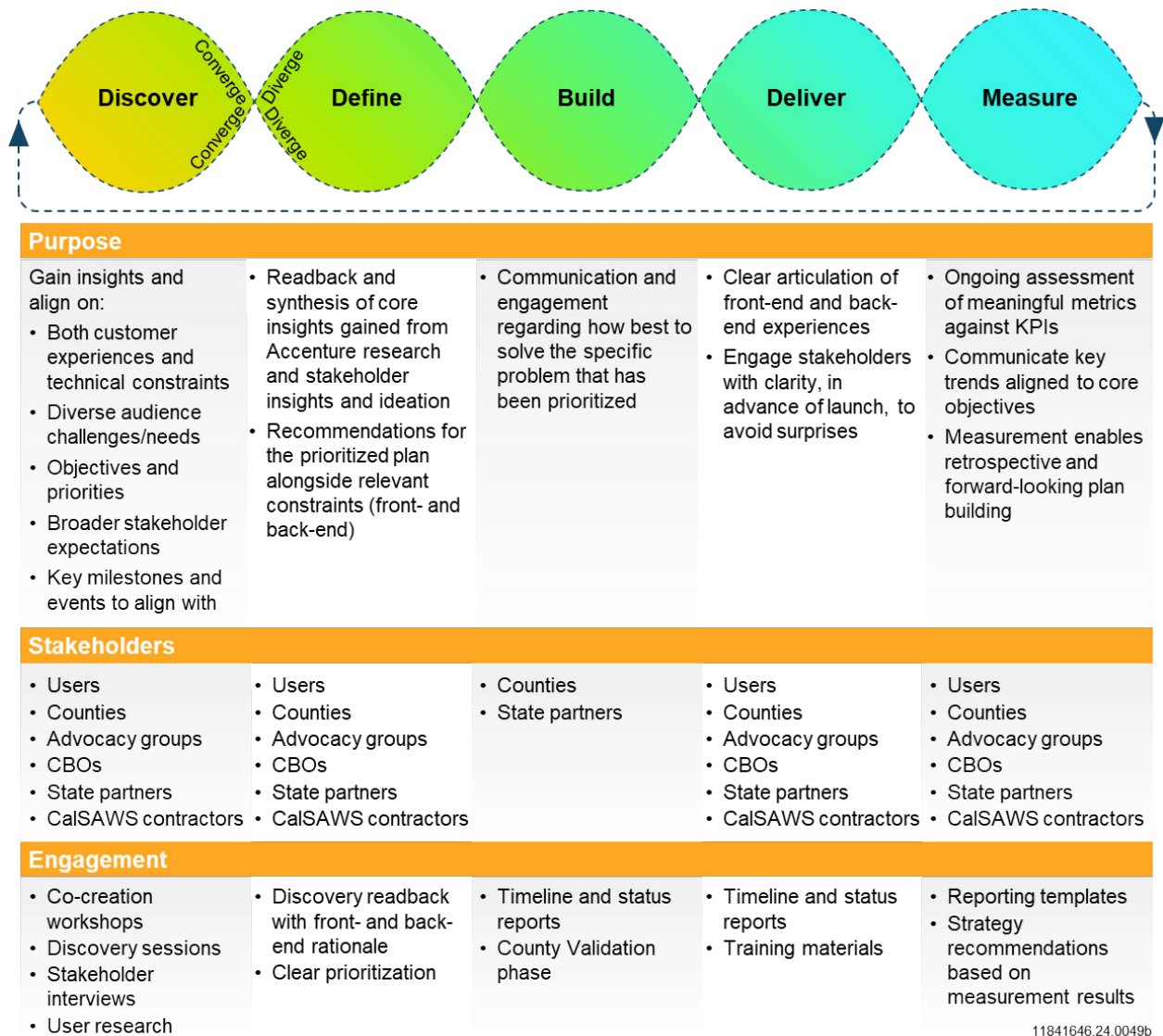


Figure 4.4-2. Our engagement model employs a continuous cycle, confirming stakeholder participation and alignment throughout the process.

Accenture has extensive experience applying this stakeholder engagement model to improve outcomes for our clients and their stakeholders.

In Figure 4.4-3, we highlight an example of real client impact at the Veterans Benefits Administration, made through engaging stakeholders throughout our end-to-end, UCD-based process. We will bring the same mindset and similar innovative solutions to engage stakeholders and improve integration of the BenefitsCal application with county processes—delivering value to you, your users, and your diverse stakeholders.



### Veterans Benefits Administration (VBA) Digital GI Bill

Since 1944, the GI Bill has provided more than \$410 billion to help get funds to 25 million qualifying veterans and their families to cover school- and training-related costs. VBA's use of antiquated systems led to delays in claims processing and benefits delivery, communication breakdowns, and lack of confidence in systems and data. The systems created a stressful experience for those running the backend as well as the service members and veterans awaiting their benefits.

VBA enlisted Accenture to introduce the Digital GI Bill—integrating modernized technology, change management, communications, and human-centered design. With this implementation, **we put end users at the center of the experience to modernize the service, not just the system.**

Applying our holistic, research-based, UCD approach, we tapped into the experiences end users desire—including pain points and commercial experiences—to inform updates to the program roadmap from Day 1. We kicked off the project by conducting over 75 user interviews to understand the end-to-end beneficiary experience and key

organizational goals, gain a holistic view of long-standing problems, and surface actionable insights leading to solutions. Coupled with existing research provided by VBA, these insights directly informed the product roadmap and planning.

Our UCD approach engaged users and stakeholders from across the entire ecosystem—facilitating cooperation and promoting the formation of a shared vision and plan. As features progress through design sprints, user testing confirms those designs achieve intent and are feasible—before development. Applying this UCD process, we transformed the technology and user experience for millions of beneficiaries.

Applying the UCD process, we transformed VBA's technology systems, improved GI Bill students' user experience, and optimized benefits processes for millions of beneficiaries.

Figure 4.4-3. At VBA, we engaged stakeholders across the ecosystem to gain insights that led to actions—modernizing benefits service delivery as well as the system.



### Key highlights of our approach

<b>Applying the UCD model end-to-end</b>	<ul style="list-style-type: none"> <li>Engage stakeholders throughout the UCD end-to-end process to enhance integration with county processes, ensure comprehensive insights from key stakeholder groups, aligned prioritization, clear timelines, county alignment during verification phase, and clear reporting.</li> </ul>
<b>Inclusivity throughout the process</b>	<ul style="list-style-type: none"> <li>Establish stronger relationships with advocacy groups and counties in Discover and Transition-In to identify audience needs and priorities, enabling better integration with processes during Define and Build stages.</li> <li>Cultural relevance and inclusivity in engagement with stakeholder groups, including advocacy organizations and counties serving diverse audiences.</li> </ul>
<b>Outcomes-focused + communication</b>	<ul style="list-style-type: none"> <li>Clear objective and measurement strategy and detailed reporting aligned to objectives.</li> <li>Communications aligned to specific stakeholder audiences leading to stronger integration with county processes.</li> </ul>

### Key deliverables

### Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal User Centered Design and Customer Experience Report Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCR.</li> <li>Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.</li> <li>Expand and further refine user-centered design (UCD) and the user experience (UX) within the software development process.</li> <li>Enhance and marketing to increase visibility and outreach for the public, counties, and CBOs.</li> </ul>
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## 4.4.3 UA9

Describe your approach to public communications and marketing to enhance the awareness, adoption, and public opinion of the BenefitsCal application.

### 4.4.3.1 Approach to public communications and marketing

At BenefitsCal, you have an important mission—ensuring Californians in need get the benefits they deserve. Key to the success of your mission is drawing users to the portal and fostering long-term relationships so they continually return. Californians need to understand what's available through the portal, how to apply for benefits, and be reminded to renew. And, when site enhancements are made, users need to know what's changed to make their lives easier and their information more secure. Current outreach efforts are insufficient for building awareness and adoption. That is why our approach assumes a campaign every quarter throughout the duration of the contract, with options to expand tactics and strategies through the SCR process. With this understanding, our approach to public communications and marketing is strategically designed to enhance the awareness, adoption, and public opinion of the BenefitsCal application.

Following, we share our qualifications as a leader in public communications and marketing, delivered through Accenture Song. We detail our approach to BenefitsCal marketing and outreach—taking an audience-first approach to meet users where they

are with personalized experiences, ideas for proactive communications, and more. Again, we apply the UCD model to address public communications and marketing efforts as a continuous cycle—from the Discover through Measure stages, looping back to ensure we continuously improve.

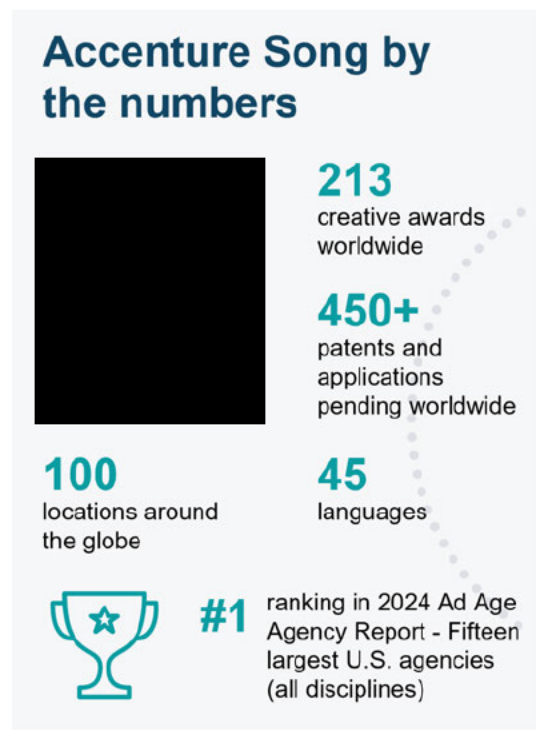
#### 4.4.3.1.1 Accenture Song—creativity and innovation combined

Through Accenture Song—the world’s largest technology-powered creative group—we provide communications and marketing services, including user experience expertise, world-class creative, and intelligent marketing performance. **We combine strategic creative and communications excellence with a focus on delivering value that’s anchored in meaningful insight and optimized by data.**

The combination of Song, together with our technology, strategy and consulting, and operations groups, enables us to provide customized marketing and outreach services within a truly end-to-end suite of capabilities.

##### Globally recognized creative effectiveness

Creativity is at the heart of all that we do. We believe it’s the reason we have won more than 350 industry and creative awards worldwide. From our modern, collaborative approach to brand, media, and channel strategy to choosing the right media mix and creative execution to maximizing impact and engagement with target audiences, we test and optimize our creative work to meet and exceed performance goals. We’re committed to a partnership that effectively connects with the people who need clear and user-centered communications. Our “California vs. COVID-19: Removing Barriers to Vaccination” campaign work, for example, was a finalist in the Effie Marketing Effectiveness awards. This program tapped into diverse populations throughout California to raise awareness for life-saving vaccination programs, and it drove Californians to action.



- As part of your base contract, we bring to you diverse skills and award-winning creative talent to launch quarterly campaigns. But know you have the added benefit of the breadth and depth of one of the world’s largest digital agencies behind this team, that can be engaged to provide additional services when needed. Through the SCR process we can flex staffing levels up or down in response to changes in current events, policy, or other factors.

#### 4.4.3.1.1.1 Marketing at Accenture Song

Our marketing and experience services are designed to help clients create distinctive customer experiences and build the operational resilience to react quickly to change. Services include:

- **Marketing strategy:** Defines clients' marketing and portfolio strategy, and brand purpose. Develops communications strategies and provides guidance to communicate the brand in an audience-first way.
- **Creative visual design:** Imagines new brand design and accompanying creative concepts then brings them to life at a local level, consistent with local cultural trends and personalized to targeted customer needs.
- **Campaign services:** Develops personalized data- and AI-driven omni-channel campaigns at scale, helping customers drive demand and optimization.
- **Marketing data & insights:** Develops analytics solutions that drive marketing strategy and optimize omni-channel campaigns and customer experiences.

Combining technology, data, and creative, we are consistently recognized by analysts like Everest Group who positioned us ahead of the 33 other providers assessed in their Marketing Services PEAK Matrix Assessment 2024. Illustrated in Figure 4.4-4, the ranking highlights our strengths including GenAI and a full suite of sustainability services including strategy consulting, measurement and analytics, and sustainable customer experience.

### Accenture is an Overall Leader in Everest Group's Marketing Services PEAK Matrix® 2024

#### According to Everest Group

Accenture Song has a proprietary technology stack of 100+ marketing solutions that supports marketers throughout the customer journey. Its AI-powered operating engine **SynOps** connects platforms and data across clients' **MarTech**, **AdTech**, and commerce ecosystems and orchestrates talent, data, and intelligent technologies into a single digital experience to deliver personalized experiences at scale.

It also leverages 40+ third-party partnerships to cater to its clients and is one of the largest global partners for Adobe and Salesforce. Additionally, it continues to expand inorganically with acquisitions of specialized agencies such as The Stable, FiftyFive5, Concentric Life, Rabbit's Tale, and Romp.

Accenture Song has recognized generative AI as a key focus area with strategic investments in proprietary tools such as generative AI content supply chain, **CPG AI**, and **AI-Retail** along with third-party partnerships with providers including Microsoft and Open AI.

It offers a full suite of sustainability services including strategy consulting, measurement and analytics, and sustainable customer experience.

Buyers have called out Accenture Song's process expertise, innovation, and flexible delivery model as its major strengths.

Source: © Everest Group, Inc. Everest Group's Marketing Services PEAK Matrix® 2024.



Figure 4.4-4. Everest Group positioned Accenture ahead of the 33 other providers assessed in their Marketing Services PEAK Matrix Assessment 2024.

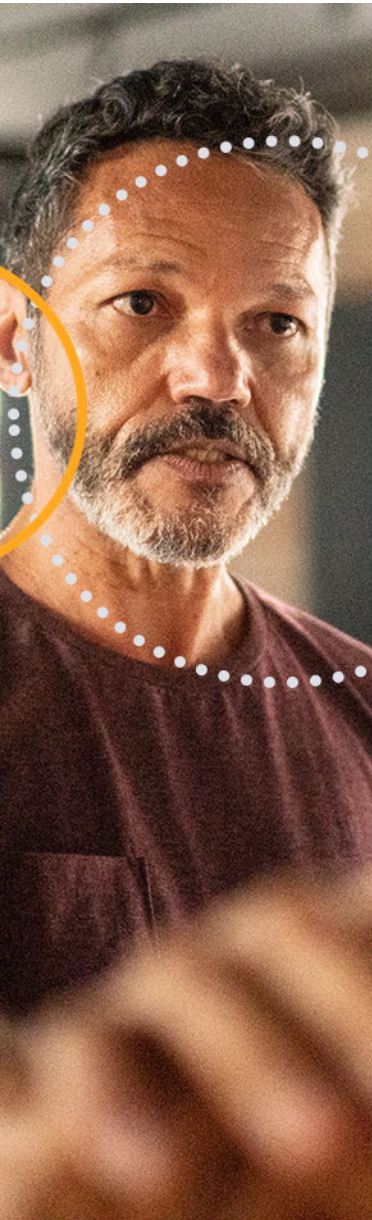
#### 4.4.3.1.1.2 Communications and marketing for the public sector

Alongside our creative capacity, we are public service experts. Our unique mix of marketing prowess helps public service agencies overcome challenges and prepare to serve residents in the future. In the United States, we have provided services for public



sector marketing campaigns for more than 10 years. We served more than 100 clients across federal, state, and local government agencies, and educational institutions.

In Figure 4.4-5, we showcase an example of the real client impact made through Accenture Song's public communications and marketing efforts. This groundbreaking work with the U.S. Department of Health and Human Services (HHS) resulted in increased awareness of 988, the new number for the National Suicide and Crisis Lifeline.



## U.S. Department of Health and Human Services (HHS) 988 Communications Campaign – Strategic Communications Plan

Accenture Song worked with the U.S. Department of HHS to create a communication and channel strategy aimed at building awareness for the launch of 988, the new three-digit number for the National Suicide and Crisis Lifeline. The Song team spent approximately two months reviewing existing research and outreach efforts and conducting research to inform prioritization and insights. Pain points and audience needs were identified for both the general population and specific at-risk demographics—pointing to the need for a strategic split of content. Testing and concepting for key messages that engage each of the key audiences followed, along with the development of a channel strategy aimed at reaching KPIs.

This channel strategy was translated into a media plan and creative development of bilingual campaign assets. Channels included:

- **Out-of-home boards:** Strategic, location-specific placements enable us to reach audiences offline
- **Social media:** Leveraging popular social media platforms (Facebook, Twitter, Instagram) provides the ability to target at-risk groups with important life-saving messaging
- **Radio:** Traditional audio and podcasts reach both a digital and terrestrial audience
- **Search:** Keyword search results for Google provides resources to those seeking help
- **Online video:** YouTube ads use Google data to match our message to the right people at the right moment



Audience insights made it possible to tailor messaging and imagery to connect with those who need it most, achieving not only awareness of the resource, but assurance that it can meet their unique, personal needs.

Figure 4.4-5. We implemented a communication and channel strategy to reach diverse audiences in the right places at the right time, increasing awareness of 988.

#### 4.4.3.1.2 A human, holistic approach for BenefitsCal public communications and marketing

As we approach the challenge of building awareness, and improving adoption and perception of BenefitsCal, we will provide targeted, tailored, and timely communications across project teams and stakeholder groups, accounting for California's diverse audiences.

##### 4.4.3.1.2.1 Addressing public opinion through enhanced user experiences

Before detailing the specifics of our approach to public communications and marketing, we address using UCD as a mechanism for influencing public opinion. We understand that communication and marketing is not the answer to every public opinion problem. Sometimes, the answer lies in solving deeper user experience challenges at the root cause. Applying our UCD model (detailed in Section 4.2), in tandem with our deep front- and back-end capabilities and integrated approach, we can solve some user experience difficulties—and their associated public opinion issues—using technical and design solutions. For instance, enhancing the BenefitsCal Portal to make experiences more personal, highlighting key information, or providing clearer routes to important pages—can make the user experience simpler and more enjoyable, thereby improving perception.

##### 4.4.3.1.2.2 Applying the UCD model to public communications and marketing

Both design and communications benefit from user-centered approaches. Great design and effective communications place users and audiences at the forefront of strategy and development. Our public communications and marketing model applies the same process that drives UCD. This ensures that the user experience is integrated into all aspects of our communications. The approach also includes measurement against established KPIs and a feedback loop—a continuous cycle for continuous improvement—with analysis of outcomes feeding into new communication strategies and plans.

Our approach includes the following key tenets:

- Clear identification of objectives
- Understanding the needs of diverse audiences spanning different demographics and dozens of languages
- Communications that are relevant, clear, and in channels where they will drive awareness outcomes
- Dedication to measurement that provides clarity on our performance as well as insights into how we can make communications more effective



Our **Public Communications Lead, Madeleine Loftus** will ensure that our planning enables proactive communications, clarity regarding important changes, and awareness-driving activities that meet the public where they are. She will lead the **BenefitsCal Marketing and Public Communications Plan** development for marketing and outreach, develop relationships with stakeholders, and report on communications effectiveness. She will work closely with the User Centered Design Lead, Product Manager, and others to ensure the user voice remains centered

and incorporated into BenefitsCal design processes, and the implications of system changes are communicated timely and adequately to users and county staff.

We will manage and execute public communication and marketing activities in cooperation and coordination with the Consortium and other contractors, consistent with the BenefitsCal Services Plan and the associated OWD, and we will build our campaigns around data-driven, insight-led communications. Our social outreach initiatives and proactive communications will be aligned to outcomes, increasing awareness for BenefitsCal, improving adoption of varied services, and building trust—improving satisfaction scores and connecting to audiences where they are.

Transition-In will include several key parts of our approach—Discover, Define, Build, and Measure. During Transition-In, we will perform the following activities:

- Engage stakeholders to establish communications objectives that stakeholder groups will align to.
- Clarify our audiences, ensuring that everyone who can receive benefits, regardless of language or ethnic background, knows that BenefitsCal is the place to do it.
- Define a channel strategy, ensuring we can connect with your audience where they are. We will deliver campaigns on a quarterly basis—not just once or twice each year.
- Begin building a more powerful creative design library.
- Build on the current measurement strategy to show how we're performing and provide deeper insights into how to improve our communications. By incorporating data-based marketing, we can act efficiently and build greater awareness among diverse populations.

#### 4.4.3.1.2.2.1 Discover: Discovery and research



Successful Discovery leads to success in marketing outcomes through unearthing our audience's communications needs, as well as by bringing stakeholders together to align on key priorities. Discovery enables better, more impactful communications and sets clear expectations for how we will engage stakeholders throughout the process.

Our core approach applies user-centered communications across the process. Discovery is an essential time where our Public Communications Lead, Madeleine Loftus, will lead collaboration across stakeholder groups—gathering feedback, understanding priorities among the stakeholder community, and aligning these parties to clarify communications and engagement objectives. Madeleine will work with our User Centered Design Lead to ensure that research activities are coordinated to cover both experience and marketing questions where possible, and align activities when discrete research is needed.

Accenture Song offers deep expertise in a variety of research methodologies, and we'll use these capabilities alongside our understanding of California's diverse populations. We use methods such as 1:1 interviews, focus groups, observation, and surveys, and we use **Purposeful Recruiting** as described in Section 4.2–UA3, to ensure that we get input from diverse audiences in line with the Consortium's goal of equitable access. Additionally, we incorporate insights from board meetings and collaborative workshops as well as social listening.



Outputs will include:

- List of prioritized audiences
- Articulation of audience needs and communications priorities
- Clarity around key communication milestones and events
- Key objectives for communications and a measurement plan



#### 4.4.3.1.2.2.2 Define: Marketing and Public Communications Plan and strategy

Defining a communications plan ensures alignment with stakeholders. It shows how we will communicate with our users and prioritized audiences. We will work with BenefitsCal stakeholders to adopt, enhance, maintain, and improve the **BenefitsCal Marketing and Public Communications Plan**, including all marketing and communications materials. We will deliver the updated plan in Month 4, with submission of additional updates as needed when changes occur.

A key focus for our Communications Plan will be to incorporate more awareness-generating tactics, especially social media, to create a more positive perception and engage audiences that do not currently use or know about BenefitsCal. The current communications strategy has not been effective in reaching a broad audience. To reach more potential beneficiaries, we will incorporate tactics specifically designed to bring in new people, enabling Californians to learn about and use this service that will positively impact their lives. We'll infuse BenefitsCal's purpose, value, and creativity across everything we do to promote organizational growth and communications relevance. We go into more detail in UA10 about how we will leverage our full stakeholder network to expand our reach and use trusted voices wherever possible.

The Define stage will result in tailored plans to maximize visibility of BenefitsCal and deepen our community outreach. The overall BenefitsCal Marketing and Public Communications Plan will include the following:

- Process recommendations for the enhancement of public communications to increase the visibility of BenefitsCal services and customer outreach—including specific social media strategies and tactics, and recommended design systems that can improve efficiency and accessibility.
- A plan for creating and maintaining standards and quality control of BenefitsCal internal and external communications to ensure consistent quality and messaging.
- Messaging template and communication framework aligned to core audiences.
- A campaign roadmap/calendar to ensure we've understood dependencies and constraints, and to provide transparency to other stakeholders.
- Identification of gaps in the Consortium's strategic partnerships with public and private organizations and a plan to bring new partnerships to fill those gaps.
- A plan for the core media outlets for ongoing relationship management.
- Recommendations for the use of electronic and web-based communication for the implementation of public relations strategies; utilizing current and emerging technologies to best reach target audiences.

For each quarterly campaign, we will create a plan that details the tactics, channels, messages, and metrics for that campaign. We have built in flexibility to the team to enable a variety of tactics for each quarterly campaign, that supports both marketing coming directly from the Consortium, and the creation of materials for other stakeholders to disseminate.

#### 4.4.3.1.2.2.3 Build: Creative development and channel planning

To build awareness, creative that is relevant to specific audience needs and clarifies the benefits of using BenefitsCal is essential. We are dedicated to delivering the message about BenefitsCal's value across various channels and touchpoints with speed, agility, and efficiency—reaching your diverse audience base with culturally-relevant communications in users' languages and aligned to what matters most to them.

As part of the Build stage, we will:

- lead the development of materials in support of BenefitsCal marketing strategies including publications, electronic communications, and multimedia presentations.
- lead and supervise graphic arts initiatives and establish quality content and design of informational and promotional materials for public consumption.
- take creative lead of production of BenefitsCal print, web, and other marketing materials.
- ensure translation of all relevant campaign materials into the 21 specified languages for BenefitsCal.

Rethinking how the audience views BenefitsCal, while respecting the existing mission and vision, we'll efficiently design and produce creative that feels distinct, ownable, engaging, and exciting to both internal and external audiences. Our approach adapts creative to the environments it will live in. We are mindful of the cultural nuances of Californians and the need for scalable effectiveness across a variety of campaigns.

We will begin creative development during Transition-In, including designers and illustrators in our process. These resources will build on the existing BenefitsCal brand, ensuring a design system is established and creating more cohesiveness across communications touchpoints—online, offline, and in-person.

Outputs will be determined during the Define stage, and may include the following:

- |                      |                 |                   |
|----------------------|-----------------|-------------------|
| • Social media posts | • Posters       | • Video/animation |
| • Emails             | • Flyers        | • Call scripts    |
| • Fact sheets        | • Landing pages |                   |

In order to ensure equitable access to benefits, we understand how important it is that content is translated into the 21 core languages of BenefitsCal users. We have partnered with **United Language Group (ULG)** to deliver translation services for BenefitsCal marketing campaigns in the State-approved threshold languages, engaging native speakers to assist in translations. We understand the list of languages may change over time and changes will follow the approved SCR process. ULG has been a trusted translation service for CalSAWS for over 15 years. They currently provide translation services, as needed, for client correspondence, text messages, and IVR messages.



Our **user-centric Communications Plan and editorial calendar** will serve a variety of needs throughout the Build stage, ensuring messaging reaches intended audiences, feels relevant and engaging, and improves perception.

The current Communications Plan emphasizes fact-based communications in media channels that may not reach your population where they are. Our approach will emphasize awareness-driving channels, such as social, to increase awareness where your residents are located.



In Table 4.4-1, we summarize the elements of our BenefitsCal Marketing and Public Communications Plan aimed at enhancing awareness, adoption, and public opinion.

Awareness	Adoption	Public Opinion
<ul style="list-style-type: none"> <li>• Incorporate channels where our potential applicants are, especially social media.</li> <li>• Clearly communicate changes to the system to build trust—with fact sheets and posters that can be shared with our stakeholder partners.</li> <li>• Ensure content is scalable and relevant to specific needs, languages, and locations.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop training content intended to simplify steps for diverse audiences.</li> <li>• Create specific messaging throughout channels (portal, email, etc.) to promote key features.</li> <li>• Demonstrate how-to, through engaging media, potentially including YouTube, to highlight innovations.</li> </ul>	<ul style="list-style-type: none"> <li>• Clarify the breadth of benefits that can be gained through BenefitsCal.</li> <li>• Build trust through easy-to-understand explanations.</li> <li>• Approach users with empathy at each touchpoint, aligning front- and back-stage experiences to facilitate future innovations aligned to behavioral insights.</li> </ul>

Table 4.4-1. Our Marketing and Public Communications Plan will contain targeted strategies to enhance awareness, adoption, and public opinion.

Marketing campaigns will leverage various channels to inform stakeholders and users of new modes of engagement with BenefitsCal and build trust with the audience. In Figure 4.4-6, we showcase examples from Accenture Song-created public service campaigns used to increase awareness and adoption.

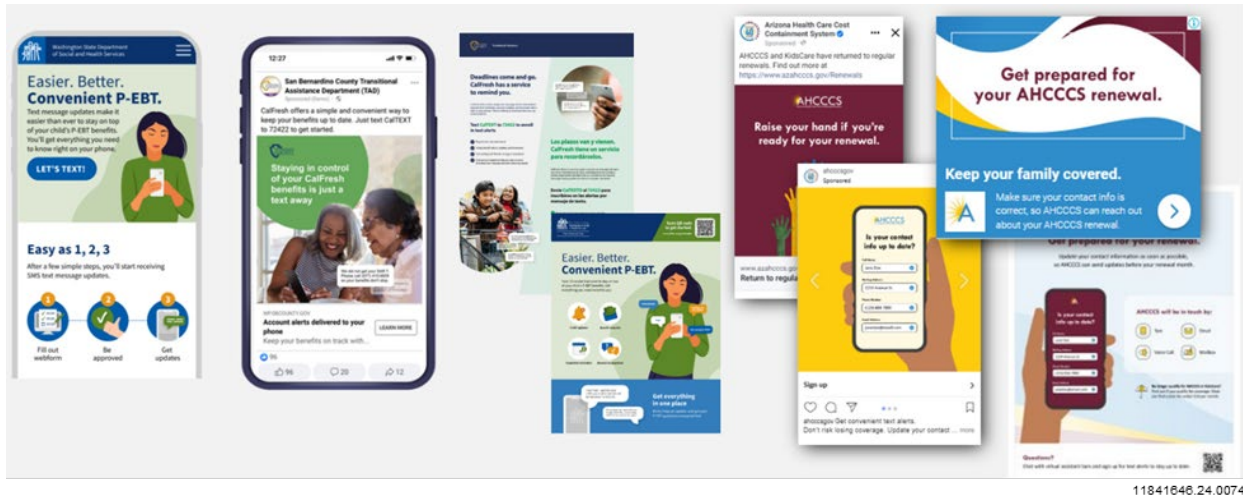


Figure 4.4-6. We'll use multiple channels to inform stakeholders and users of new modes of communication and engagement with BenefitsCal.

#### 4.4.3.1.2.2.4 Deliver: Distribute campaigns to our diverse audiences

The Deliver stage confirms we're meeting our audience with distinct creative in the right channel where it can drive awareness and actions. The delivery of our communications will be aligned to our diverse audiences—in their language, through channels where they are engaged, and with creative excellence.

Currently, campaigns for BenefitsCal are infrequent. Our approach will be to deliver quarterly campaigns, as well as delivering creative messaging aligned to key events, ensuring a high level of awareness throughout the year.

Additionally, through improving the Collaboration Model, we will ensure our communications are thoroughly connected to our key objectives, clearly explained to partners, and leverageable by the broader network of campaigns run through our stakeholder groups. An example of our similar work is the Continuous Coverage unwinding campaign through DHCS, which leveraged over 2000 ambassadors to drive awareness of changes. The campaign was released in 19 languages and reached 15 million members regarding renewals. By connecting our discovery work to unearth key events like this, we can build awareness in a way that is dramatically different from the tactics that are used today.

In addition to our marketing efforts, we know that media relationships are critical to getting constructive messages into the right channels. Because media relations are such a specialized skill, we have teamed with **Lucas Public Affairs (LPA)**. LPA is a California-based media relations and PR firm, and they will be an integrated part of our Customer Outreach and Marketing team under Madeleine Loftus' leadership. We selected LPA first and foremost for their deep-rooted connections to media outlets in California. They partner with the State's leading foundations, nonprofits, businesses, and government entities to strategically navigate the crossroads of policy, politics, and communications on the issues that define California's future. LPA delivers smart strategy, diversity of thought, and deep-rooted connections to get the right people to care about issues.

#### 4.4.3.1.2.2.5 Measure: Confirming our collective progress

Measuring the impact of marketing and outreach efforts against predefined KPIs is essential for evaluating success and guiding future improvements. This step ensures that our communications efforts evolve based on outcomes and data-driven insights. As part of this stage, we will provide BenefitsCal with data and supporting back-up detail, including metrics used to gauge the success of the user experience, performance indicators, and outcomes; website usage and usability targets; and targeted objectives as requested by the Consortium.

During Transition-In, together with the Consortium and stakeholders, we'll identify and agree upon KPIs in alignment with our shared goals and objectives. For marketing and outreach, our overall mission is improving outcomes for Californians. Our objectives in support of this mission include increasing awareness and adoption, improving perception, and developing long-term relationships with those who receive benefits. From these objectives, we drill down to identify quantifiable KPIs to work toward. Measuring against these KPIs will confirm our progress. With continuous improvement as a key tenet of the service we provide, we will adjust communications and outreach activities as necessary—optimizing channels and communications tactics in an agile way—to ensure we reach targets and generate the most value for BenefitsCal.

We will provide the data you need, transparently and in a context and format that enables insights. We will also structure our measurement plan to provide ad hoc reporting, based on templates we will co-create during the Discover and Define stages. In Figure 4.4-7, we illustrate our differentiated approach to measurement with examples of the types of data you see today and the data/KPIs we'll work with you to define and capture.

### What makes data meaningful?

- ✓ **Relevance**
  - Data in context, relevant to your specific needs and goals.
- ✓ **Quality**
  - Data that is accurate, reliable, and timely.
- ✓ **Accessibility**
  - Intuitive dashboards and reporting provide data transparency and make it easy for stakeholders to access and understand the data.
- ✓ **Analytical capability**
  - Using innovative analytical techniques, including machine learning and artificial intelligence, we uncover hidden patterns and insights within your data.
- ✓ **Actionability**
  - We provide clear, strategic recommendations based on data insights and implement changes that drive measurable outcomes and actionable insights.

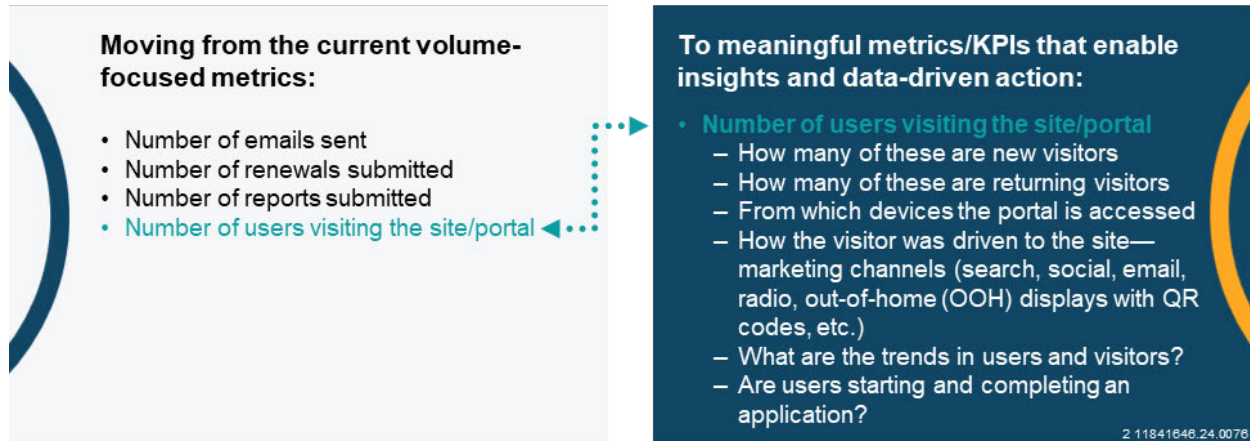


Figure 4.4-7. We will define and capture focused metrics that provide a meaningful view of performance. Currently, reporting is cursory and does not provide actionable context.

### Dashboards and reporting

As part of the measurement process, we will review and confirm the current set of reports and dashboards during Transition-In, and again after enhancements are implemented through the application evolution process. If together we determine a need for reporting or dashboarding that does not already exist, we will work with you to establish and refine templates to meet your requirements following the Collaboration Model and SCR processes. We will also align on KPIs that show progress toward new or evolving objectives, as required.

At all times, stakeholders will be able to access dashboards, providing transparency and real-time availability of the data and metrics needed to assess performance, campaign effectiveness, and progress against established KPIs.

Accenture will develop enhanced reporting capabilities for marketing and communications activities. During Transition-In, we will work with the Consortium, stakeholders, and other contractors to determine the required outputs of new reports for public communications and marketing. Reports will provide meaningful data enabling insights and data-driven decisions.

Accenture will develop and provide the Consortium, other contractors, State partners, and stakeholders with **marketing campaign reports** for both short and long-term marketing initiatives, including the intended results, benchmarks, metrics, and key highlights to be captured, iterative results reporting, effectiveness of the marketing campaign, and the analysis of campaign failures and successes. We will consult with and provide oral reports and presentations on BenefitsCal related issues to the Joint Powers Authority (JPA), Consortium Executive leadership, Project Steering Committee (PSC) and other Consortium teams, and stakeholder groups.



### Innovation for outcomes-focused experiences

From our experience with other clients, we have ideas for innovations that we believe will further the objectives of BenefitsCal and alleviate some of the core challenge areas. Following, we highlight a selection of these ideas that we would raise and prioritize through the innovation process described in Section 4.3–UA6.

- **Policy chatbot:** Provides community-based organizations (CBOs) and the public with easy access to answers about policy and eligibility rules.
- **GenAI for translation:** Supplements native speaking workers with GenAI for a smoother and faster process for language translations, enabling better service for California's diverse populations.
- **Proactive communications:** We incorporate proactive communications during key points in the process where reminders and two-way communication can improve the experience, expedite completion of applications, and aid in renewal and reduce churn. We know text messages are more than four times more likely to be opened than emails. This solution has a higher success rate than other channels, enables two-way communication to answer questions, helps users, and reduces effort at the county level. As illustrated in Figure 4.4-8,

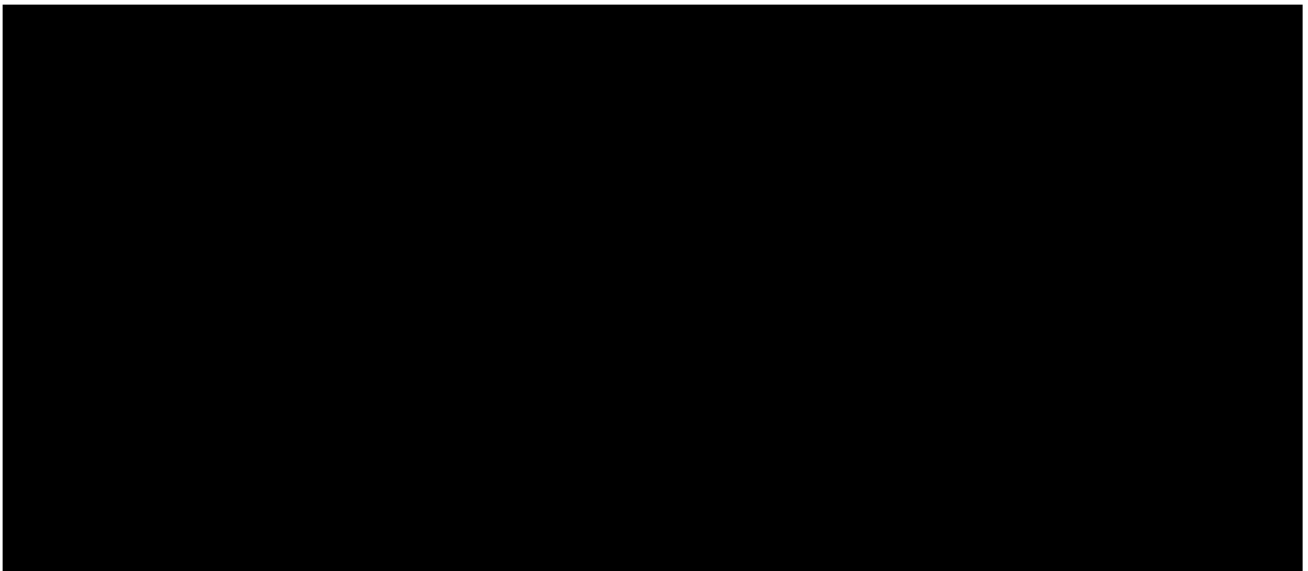
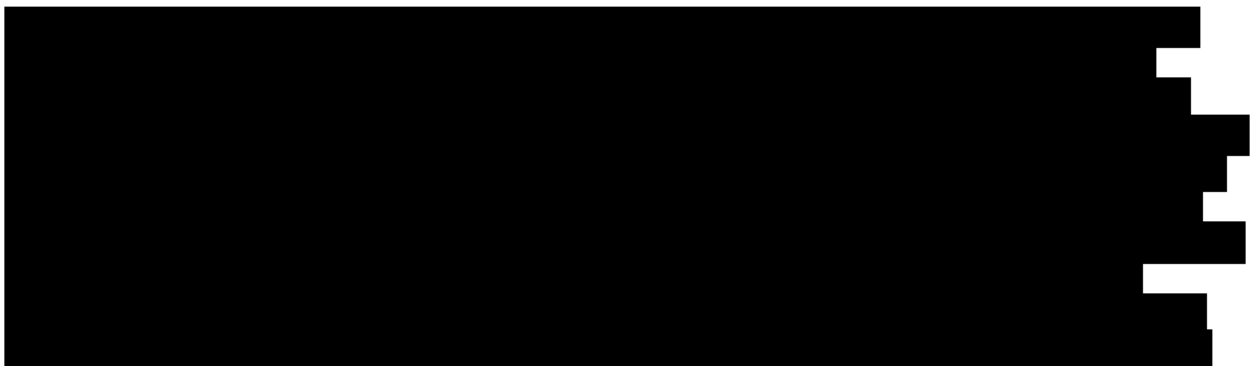



Figure 4.4-8. Using proactive communications, BenefitsCal can improve experiences and engagement, and reduce staff workload.







Our proactive communication capabilities have had significant impact for agencies facing diverse challenges. We've improved the journey from unemployed to reemployment with the Tennessee Department of Labor & Workforce Development, and enabled the journey to register and maintain food and need-based assistance for the San Francisco Human Services Agency and the Ohio Department of Job and Family Services.

Accenture's unique process unites communications and technical expertise in a common framework—enabling us to incorporate innovative solutions, such as AI and GenAI, to bring value and improve outcomes for BenefitsCal. In Figure 4.4-9, we highlight key areas where GenAI can benefit the marketing and outreach process, including proven outcomes Accenture achieved using these innovative solutions for our clients.



*\* Selective statistics across Accenture GenAI work; not representative of exact outcomes.*

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Figure 4.4-9. We incorporate innovative solutions like AI and GenAI to increase productivity and marketing effectiveness.

#### **4.4.3.1.2.3 Real client impact—applying the public communications and marketing model**

To illustrate how we apply our UCD-based public communications and marketing model—from capturing insights in Discovery through Measuring outcomes—we highlight our work with Arizona's Medicaid agency in Figure 4.4-10. Thinking differently about how to best reach customers, we introduced a user-centric campaign built around data-driven and insights-led communications. This campaign, including social outreach initiatives and proactive communications, resulted in increased awareness and trust, reduced churn, and significantly improved client satisfaction scores. We will bring the same mindset and similar human-centered solutions to help BenefitsCal improve outcomes for Californians.



## State of Arizona, Arizona Health Care Cost Containment System (AHCCCS) Integrated Eligibility System M&O – Marketing and Outreach

After taking over M&O for Arizona's integrated eligibility system, HEAplus, Accenture collaborated with the Medicaid agency, AHCCCS, to improve HEAplus operations and prepare for the Public Health Emergency (PHE) unwind effort. Together, we identified innovative UCD processes and user experience (UX) initiatives—including marketing and outreach.

We introduced a social outreach initiative and proactive communications to Medicaid members with the goals of decreasing agency workloads and improving Arizonan outcomes. To achieve our shared objectives, we conducted multiple UCD/UX-focused workshops with the State. Harnessing the results of these workshops, we delivered the following:

### Social Awareness

- Strategic approach to including and engaging with tribal communities as we created our social outreach campaign and utilized platforms such as Google, Facebook, Instagram, and more, making sure our messaging and outreach mechanisms were inclusive of the various demographics within Arizona's diverse population, while incorporating feedback directly from these populations
- Rapid response communications outreach program that delivered critical updates on the return to the regular renewals process to the State of Arizona's 2.5 million AHCCCS members
- Drove awareness to virtual chatbots and proactive communications—building public awareness and trust in the Accenture-delivered solution
- Customer-centric campaign built around a data-driven, insights-led communications strategy
- Leveraged quantitative and qualitative data inputs to understand AHCCCS member demographics and solve for pain points and informational barriers that could impact message resonance and required action
- Inclusivity was at the heart of the campaign—down to the imagery selected to demonstrate individuals, families, and communities

### Proactive Communications

- Co-created an application, change reporting, and renewal journey with 13 critical points designed for proactive engagement personalized for each individual/family journey
- Reaching almost 2 million households through a combination of text, email, and voice calls with over 7 million conversations
- AI model including two-way communications so members can truly engage with the agency, not just receive updates
- 89.4% customer satisfaction
- Returned mail solution that automatically triggers proactive engagement with a member via cell, email, or voice call encouraging them to update their contact information

Sample feedback from Arizonans engaging with our AHCCCS innovative solutions:

- ✓ "Sam [AHCCCS' virtual assistant] helped me with updating and understanding what and what not to include"
- ✓ "I can't go to an office and this is an EXCELLENT way to communicate and be able to fix my coverage or update changes" (translated from Spanish)
- ✓ "Reminder is much appreciated due to all the changes after COVID pandemic"
- ✓ "Reminded me to do things that I would have otherwise forgotten to do"

Figure 4.4-10. Applying the UCD process to marketing and outreach, we drove awareness and increased trust at AHCCCS.





### Key highlights of our approach

<b>Improved collaboration</b>	<ul style="list-style-type: none"> <li>Our strategy for public communications and marketing leverages the Collaboration Model as our foundation. We're not just refining tactics; we're forging partnerships with stakeholder groups to amplify our message and achieve our core marketing goals in bringing new users to BenefitsCal.</li> </ul>
<b>Awareness-building tactics</b>	<ul style="list-style-type: none"> <li>We're harnessing the power of awareness driving channels and differentiated creative, disseminating our message across social media channels to create wider-scale impact, ensuring diverse populations are well-informed.</li> </ul>
<b>Deep measurement</b>	<ul style="list-style-type: none"> <li>Measurement strategy and reporting that dives deep into the effectiveness of our communications and engagement among residents. We believe measurement is a key capability to improve the lives of Californians, not just showing the number of tactics, but demonstrating the impact of our communications.</li> </ul>
<b>Transparency throughout the process</b>	<ul style="list-style-type: none"> <li>We will employ the same model and process as UCD, ensuring frequent engagement with stakeholders, building trust, and creating a stronger foundation of groups aligned to the mission of improving Californians' lives.</li> </ul>

### Key deliverables

### Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal Marketing and Public Communications Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.</li> <li>Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.</li> <li>Expand and further refine user-centered design (UCD) and the user experience (UX) within the software development process.</li> <li>Enhance communications and marketing to increase visibility and outreach for the public, counties, and CBOs.</li> </ul>
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## 4.4.4 UA10

Describe your approach to engaging with the Stakeholder Community to enhance the awareness, adoption, and Stakeholder Community perception of the BenefitsCal application.

### 4.4.4.1 Approach to engaging the Stakeholder Community

Spanning 58 California counties, BenefitsCal's intended audience is incredibly diverse and varied. Many of your audiences are hard to reach; they may be limited/non-English speakers, have limited access to technology, or mistrust government programs. For these audiences, it is particularly critical to effectively engage the trusted Stakeholder Community that knows those people best as we work to enhance awareness and adoption of BenefitsCal.



Our approach to Stakeholder Community engagement is grounded in the belief that these groups have **invaluable insights** to share and provide **a unique channel** to the audiences we serve. We collaborate not just because it is

required, but because we believe that Stakeholder Community expertise is necessary to get to the best outcomes for BenefitsCal and Californians.

**A source of insights:** Advocacy groups, CBOs, and Community Assisters work closely with vulnerable communities and know well the challenges they face and the context in which they are applying for benefits. In Section 4.2–UA3, we discussed how we engage these groups to help us understand usability and experience challenges. These Stakeholders also can help us identify the awareness and adoption challenges facing their residents and provide valuable input on the best ways to reach those audiences.

**A unique channel:** Stakeholder Community groups work directly with the users we are trying to reach. They can provide access for research purposes to ensure we hear directly from our target audiences. Moreover, they themselves communicate directly with those audiences. Core to our strategy is empowering Stakeholder Community groups with effective messages and resources so they can drive awareness and adoption in every interaction they have with current and potential BenefitsCal users.

Our efforts in stakeholder engagement are led by our User Centered Design Lead, Kendrick Lim, as part of the Collaboration Model and UCD approach, and supported by our Public Communications Lead, Madeleine Loftus. Because we understand these relationships are absolutely critical to the Consortium, Lisa Salas, our Project Manager, will provide regular oversight and guidance to ensure the smoothest possible management of these relationships.

#### 4.4.4.1.1 Aligning on outcomes, a proven approach

Engaging with the Stakeholder Community is not easy. These organizations are passionate about the people they serve, but often lack a deep understanding of the policy, budget, or technical constraints that get in the way of the improvements they request. When they don't understand where progress is being made, or they feel like they are not being adequately engaged, they create public outcry on behalf of the people they serve. This can be disruptive to progress and further degrade public trust.

Fortunately, the core goal of these groups is absolutely aligned with the goals of the Consortium, BenefitsCal, and Accenture: **we all seek to get Californians the benefits they are entitled to, through a process that is simple and efficient.**

Through our experience in other states and with the federal government, we found that improving relationships and perceptions of advocates, CBOs, and community assisters starts with clearly articulating the shared goals, agreeing to key metrics that help show progress towards those goals, and then transparently sharing progress and obstacles. This starts with creating visibility and soliciting input on the five-year strategic plan for CalSAWS. We will work with the Consortium to create an appropriate process to solicit input from the Advocacy and Stakeholder Communities as part of the annual adjustments, and be transparent with them about the finalized plan.

As discussed in UA8, we will engage in a process of alignment during the Transition-In period. Stakeholder Community groups will be critical participants in that process. The team will begin with Discovery—familiarizing themselves with historical feedback and communications from and with Stakeholder Community groups and conducting 1:1

interviews with core stakeholders to understand the current state of the relationship from their perspective. We'll synthesize those findings with the findings from counties and Consortium stakeholders and share the current state and insights around improvement areas in a collaborative session.



We then facilitate the creation of shared goals, objectives, and KPIs through the process detailed in UA8. Shared goals are future focused around our shared vision. A shared goal might be "increased participation of benefits programs."

These goals are then broken down to measurable objectives about how we might increase awareness in under-enrolled groups or remove barriers to online application. Goals are then decomposed into concrete KPIs, with measurement strategies and a reporting cadence. Decomposing measurement in this way has many benefits:

- Aligns stakeholders around a common vision and builds buy-in and trust for the measurement strategy
- Shows the interdependency between different touchpoints across the benefits lifecycle, enabling more end-to-end thinking as enhancement and outreach decisions are made
- Identifies limitations in measurement and can create strategies to close those gaps

#### 4.4.4.1.2 Learning from the Stakeholder Community

As discussed in Section 4.2–UA3, the Stakeholder Community provides critical input to identify improvement points in the application. In UA9, we discuss how those same groups help us understand the mindsets of our target audiences, the core gaps in awareness, the messages that will reach those groups, and the most effective channels for those messages.

During the Transition-In phase, as we build towards the Marketing and Public Communications Plan, Stakeholder Community groups will play a critical role in the following ways:

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Sharing insights about target user groups</li> <li>• Providing access to research participants or conducting research on our behalf</li> <li>• Understanding the communication channels they use to reach their residents, and what materials and support will be necessary to mobilize those channels</li> <li>• Identifying audiences where we have gaps in direct communications—and</li> </ul> | <ul style="list-style-type: none"> <li>then identifying additional stakeholder organizations that might help fill those gaps</li> <li>• Helping to identify additional organizations that should be engaged as part of the Stakeholder Community</li> <li>• Working with Lucas Public Affairs to validate and identify diverse media outlets that are trusted by our hardest-to-reach audiences</li> </ul> |
|---|--|

Once Transition-In is complete, Stakeholder Community groups will be engaged through the Collaboration Model and UCD process. These groups will serve as primary contributors to **generative research** throughout the process, keeping our understanding fresh and helping identify new or emerging awareness and adoption issues. Stakeholder Community groups will also contribute extensively to **evaluative research**, providing feedback on proposed strategies and draft outreach and communication content.

Following, we highlight our work with Ohio Benefits, where we worked closely with the Stakeholder Community to improve service delivery to Ohioans. Together, we prioritized



simplicity, clarity, and accessibility in the design of benefits application processes, ensuring that Ohioans seeking benefits can access the help they need quickly and easily.



#### State of Ohio, Department of Administrative Services (DAS): Ohio Benefits Portal

As part of the State's focus on improving service delivery to Ohioans through customer-centric and data-driven approaches, Accenture was enlisted to improve the benefits application process for Ohio residents. Over eight months, the State and Accenture **collaborated with two county offices, nearly 500 residents, and Stakeholder Community groups—including three agencies, 14 food bank representatives, and three Medicaid assisting organizations.**

Several research methods gathered input on key pain points from different stakeholder groups. An initial study using the AI-enabled WEVO platform collected qualitative and quantitative input from over 400 residents. Ethnographic research observed and interviewed Ohioans in Hamilton and Preble counties.

**Focus groups with food banks uncovered unmet needs, and deep-dive diary studies with helping organizations and applicants captured detailed logs of the application experience.** Crowd-sourced user feedback on SSP design enhancements was collected using the WEVO platform.

Through this collaborative endeavor, we delivered a mobile-friendly, empathetic, human-centered Self-Service Portal (SSP) experience. WEVO studies measured the SSP experience before and after updates, showing a 50 percent improvement across five categories—first impressions, engagement, intuitiveness, trust, and value.

#### 4.4.4.1.3 Mobilizing Stakeholder Community groups to build awareness and adoption

We will work with Stakeholder Community groups to understand the communication channels available directly between these organizations and our intended audiences. Where channels exist, we will define the kind of support Stakeholder Community groups will need to maximize the effectiveness of communications and create consistency with communications coming directly from BenefitsCal.

Once Transition-In is complete, we will confirm that each awareness and adoption campaign includes a **Stakeholder Community Toolkit**. This toolkit will contain materials and guidelines for the Stakeholder Community groups as agreed upon in the Marketing and Public Communications Plan—making it easy for them to pick up and adapt the campaign materials, and providing the support needed to effectively deliver those

messages. Whether via email, on their website, or through in-person interactions, this approach not only maximizes the number of contacts key audience members receive, it also leverages trusted voices that will have the most weight and credibility with our hard-to-reach audiences. Additionally, this support model continues to build trust with the Stakeholder Community groups themselves—improving their perception of BenefitsCal.

This approach has been successful even on very sensitive issues with traditionally hard-to-reach audiences. In Figure 4.4-11, we share the story of our successful approach in Arizona, reaching Tribal Communities to increase awareness and protect them from fraud.

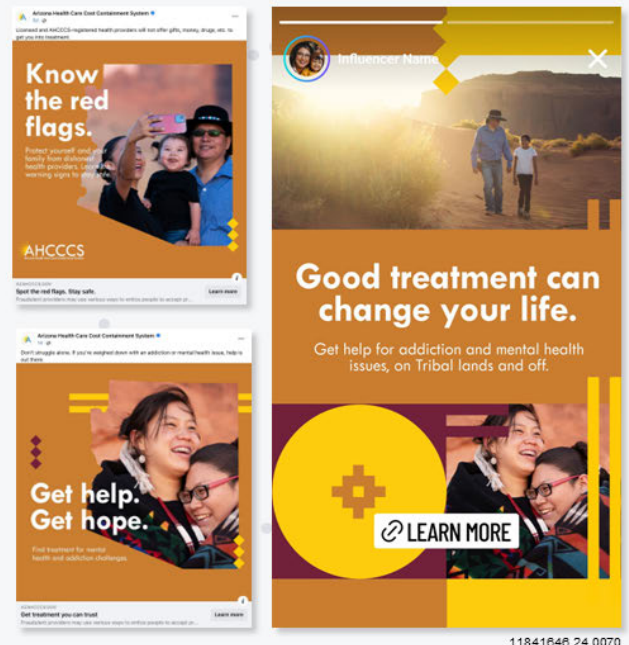
## Arizona Health Care Cost Containment System (AHCCCS)

The mission of the Arizona Health Care Cost Containment System (AHCCCS) is to provide comprehensive, quality care to those in need.

AHCCCS and Tribal Nations in the State of Arizona share the common goal of decreasing health disparities and maximizing access to critical health services. Accenture worked with Tribal Nations to design and implement a campaign to educate Tribal Communities about healthcare fraud warning signs and more.

The campaign not only had direct communications from AHCCCS, but also created a partner toolkit for use by Tribal Community Organizations – it was even used by Tribal Royalty to spread the message.

Not only were the traditional campaign metrics positive, but the Tribal Communities deeply appreciated the approach. Accenture, AHCCCS, and the Tribal Communities continue to work together on this important issue.



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Figure 4.4-11. In Arizona, collaboration with Tribal Communities is driving awareness on fraud prevention.

### 4.4.4.1.4 Change management and other support channels

An important element of building adoption and improving perception is to have sufficient training and support materials so that users are aware of changes, understand how to navigate, and can quickly get their questions answered.

We believe the best solutions are simple, easy to use, and have support built in along the way so people can solve their problems in real time. As part of our ongoing enhancements and innovation process, we will work to improve the usability of the application, the inline help content, and the chatbot so most questions can be answered quickly and without help from a county worker, or other assister. Section 4.2–UA3 and Section 4.3–UA5 and UA6 provide more detail about our proposed improvements and innovations.

During Transition-In, among the questions we will seek to answer through our user and stakeholder research, is which areas require additional training and instructional


materials while other usability improvements are being developed. We will build a backlog to be prioritized with the Consortium to create clear, concise educational and instructional materials and to hold webinar and trainings to close those usability gaps. Where webinars are necessary, they will have live captioning for accessibility, and be translated in multiple languages.

As new enhancements are planned and developed, we will work with stakeholder groups and users to determine the appropriate change management and training plans. After releases, we will solicit feedback on the effectiveness of those materials and incorporate that feedback into future releases.

#### **4.4.4.1.5 Transparent communication and ongoing feedback builds trust**

It is important that we evaluate the effectiveness of our engagement strategies and continuously improve. On an annual basis, we will collect input from stakeholders on how the Collaboration Model and UCD processes are functioning. We will synthesize their feedback and make recommendations for improvements. This commitment to improving and direct feedback builds trusts and gets us all to better outcomes.

Additionally, we believe regular updates on the progress of application evolution and innovation, as well as any issue resolution, is an important component of building trust and improving perceptions. We report on metrics and also on status of items in development and in the backlog—so Stakeholder Community groups have clear expectations on progress.



## Key highlights of our approach

<b>Vision and goal alignment</b>	<ul style="list-style-type: none"> <li>During Transition-In, we set a vision and measurement framework that aligns all Community Stakeholder groups and creates clear expectations for measurement and reporting.</li> </ul>
<b>Learning from the Stakeholder Community</b>	<ul style="list-style-type: none"> <li>The Stakeholder Community offers critical insights about awareness and adoption gaps from hard-to-reach audiences.</li> <li>The Stakeholder Community will be engaged to provide evaluative feedback on all communications strategies and draft executions.</li> </ul>
<b>Mobilizing Stakeholder Community groups</b>	<ul style="list-style-type: none"> <li>Stakeholder Community groups offer a unique and trusted channel to communicate with hard-to-reach audiences.</li> <li>Accenture creates Stakeholder Toolkits as part of each campaign for use and adaptation by Stakeholder Community groups.</li> </ul>
<b>Transparent communication</b>	<ul style="list-style-type: none"> <li>Regular communication on progress of system enhancements, communication campaigns, application backlog, and KPIs builds trust and improves perception from the Stakeholder Community.</li> </ul>

### Key deliverables

### Alignment to the Consortium's vision

<ul style="list-style-type: none"> <li>BenefitsCal Marketing and Public Communications Plan</li> </ul>	<ul style="list-style-type: none"> <li>Fully integrate with the CalSAWS ecosystem and adhere to established processes including PMO, DI, and SCRs.</li> <li>Continue to enhance the Collaboration Model and stakeholder engagement and communication processes.</li> <li>Expand and further refine user-centered design (UCD) and the user experience (UX) within the software development process.</li> <li>Enhance communications and marketing to increase visibility and outreach for the public, counties, and CBOs.</li> </ul>
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