

# Understanding and Approach to BenefitsCal Services

## Section 4

### RFP Reference: 6.3.3.6 Section 4 – Understanding and Approach to BenefitsCal Services

The Bidder shall provide a detailed narrative response to the Understanding and Approach topics outlined in Section 5.2.3. Bidders will respond to the following areas to satisfy or exceed the RFP requirements as described in Section 5 – BenefitsCal Requirements addressing the following topics:

- Sub-Section 5.2.3.1 – Integrated Multi-Contractor Environment
- Sub-Section 5.2.3.2 – Software Development
- Sub-Section 5.2.3.3 – Application Evolution and Innovation
- Sub-Section 5.2.3.4 – User Experience, Marketing and Public Communications

Each sub-section response to Proposal Section 4 – Understanding and Approach may not exceed 30 pages.

**From Day One of the current BenefitsCal Project the messaging was that the initial implementation of BenefitsCal was a starting point—a foundation. Building on that foundation takes more than just maintaining what we have already established. It takes a fresh look each and every day at what could be done to enhance interactions, reduce total cost of ownership, increase trust, minimize the challenges with the eligibility and enrollment process, reduce churn, contain foot traffic and phone calls, improve transparency, accelerate SCR delivery time, protect sensitive information, solidify working relationships and other goals. These can't just be words on a page. They require planning, sponsorship, measurement and ultimately execution. With Deloitte by your side, we can move from the foundation we initiated together during a pandemic to the ongoing evolution of BenefitsCal.**

## Section Highlights

### Ready to Take Modern to the Next Level

- An enhanced User-Centered Design (UCD) approach that retains what works and evolves to be even better than today.
- Significantly improved customer adoption using a modern marketing plan, methods, and channels.
- New UCD data gathering points with Counties to improve BenefitsCal integration with County processes.
- More holistic design and delivery with the unmatched BenefitsCal system and Deloitte's infrastructure operational knowledge.
- Strengthened working relationships with Contractor community through accelerated end-to-end solutioning and resolution with coordination with the Delivery Integration Team.



## “If you’re not planning, you’re planning on failing.”

This statement has never been truer than in our current environment where technology and—by extension—customers’ expectations for service are rapidly evolving. We need to continually think ahead to exceed BenefitsCal users’ expectations. In our multifaceted and dynamic landscape, achieving success requires a harmonious balance between collaboration, cutting-edge technological advancements, and transparent communication among stakeholders. Success depends on managing CalSAWS’s complex stakeholder environment in close coordination with the Consortium and CalSAWS M&O, Infrastructure and QA vendors to deliver change. In the last four years, we have worked with you to deliver a state-of-the-art BenefitsCal Portal, but the journey does not stop there. We need to continue to evolve as the technology advances; as expectations advance; as county operations advance; as policy advances. We need to focus on technical advancements that not only improve the efficiency and effectiveness of BenefitsCal portal but also enhance the overall customer experience by making interactions more personalized and responsive. Our approach to technical advancement is not a technology-first approach but rather it is a customer first-approach. All great technical updates will be futile if it does not meet the customer’s needs and expectations.

You have seen positive adoption of BenefitsCal in the last three years where over 4.5 million Californians have chosen to apply for and maintain their benefits on their terms. There is still room to grow. We are committed to significantly enhancing adoption rates by intensively expanding our User-Centered Design (UCD) research. The strategic expansion will be coupled with targeted communication with key stakeholders, enabling us to deeply understand and effectively address the specific challenges associated with adoption. In the last six months, BenefitsCal has had such increased brand recognition that Customers indicated a desire that all text-based messaging from BenefitsCal and CalSAWS be branded as coming from BenefitsCal. Through our social media listening efforts, we also see Californians often tag BenefitsCal when they have questions or need support regarding their benefits. Capitalizing on the brand recognition is part of our plan moving forward as we boost perception, awareness and ultimately the adoption of BenefitsCal.

Another key aspect of adoption is to build trust with the users. It’s difficult to build trust but very easy to lose it. We will focus on user-friendly design, clear communication, strong security measures, and reliable service to build that trust. We have delivered a portal that is intuitive and accessible, as we continue the journey, we will work with you and relevant stakeholders to enhance communication about its capabilities and updates through targeted communications. As we have advanced so has the “bad actor”. We continue to work with you to deploy strong security protocols to protect user data, while consistent performance and effective support options, including comprehensive self-help resources and accessible human support to enhance user satisfaction.



Actively soliciting and incorporating user feedback demonstrates responsiveness, and personalizing the user experience makes the service more engaging. Continuous improvement through strategic innovation and application evolution and quality assurance further strengthens user trust and satisfaction. In the following sections, we expand on our understanding and approach and demonstrate how it fits with your vision of BenefitsCal. Our approach is predicated on us not only being responsive but also proactive in refining our strategies to meet user needs and expectations, thereby driving successful outcomes, and maximizing the value of our solutions.

With a CalSAWS enterprise that has dependencies across technologies, services and communications, CalSAWS Contractors and the Consortium are reliant upon a culture of open communication and relationships for the ongoing success of the CalSAWS enterprise. This includes making sure that all team members understand the position that each other is playing on the team, how best to engage them (i.e., what collaboration tools), how to navigate the CalSAWS governance structure, including when to engage the Delivery Integration Team for assistance. Our team is at the ready to engage with the Delivery Integration Team to not just make suggestions about ways to continuously improve the DI framework but also to help with driving the execution. We operate with the mindset of evolving and increasing awareness of our team's activities so that there is visibility across all levels of the organization and with our Contractor community.

Deloitte stands ready to help the Consortium navigate the next five years and evolve BenefitsCal to be the preferred access channel for Californians.

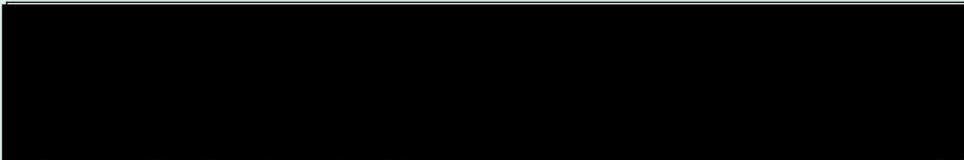


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## 4.1 Integrated Multi-Contractor Environment

### 5.2.3.1 Understanding and Approach to the CalSAWS Integrated Multi-Contractor Environment

The Consortium has embraced a multi-contractor environment to enable the best thinking, solutioning and engagement from its contractor community—an environment where contractors can bring forth perspectives and ideas to contribute to the greater good of CalSAWS and its stakeholders. As the BenefitsCal M&E vendor, Deloitte has been a part of that ecosystem over the last four years working together with our contractor partners and the Consortium to tackle day to day and strategic challenges that CalSAWS faces: from document upload service desk incidents to fielding AskCalSAWS, SCERFRA/SIRFRA and advocate inquiries to planning for Zero Trust Architecture changes. We evolve along with the Consortium and our contractor partners, with input from the Delivery Integration (DI) Team, to adjust and enhance the strategies and approaches to meet emerging challenges and opportunities. This dynamic approach is instrumental in helping the Consortium and CalSAWS stakeholders achieve their strategic goals.

Critical to our collective success is the integration with a broader ecosystem of Contractors. These Contractors support and maintain integrated solutions for core CalSAWS, Imaging, Identity Management, contact center (for Live Chat) and other applications and services essential to BenefitsCal operational excellence. As we continue our work with team members that maintain and enhance BenefitsCal today, we actively embrace a culture of collaboration and unity that always puts your and CalSAWS stakeholders' needs at the forefront of our operations.

In line with the Consortium's expectations, our approach to managing BenefitsCal centers around promoting a cohesive, unified team across the CalSAWS Contractor community. While we have been engaged with the SAWS ecosystem through CalWIN, WDTIP, LA LEADER and ISAWS, we are the most recent new Contractor to join the CalSAWS community a little of four years ago to lead the implementation and maintenance of BenefitsCal. Coming into an established community necessitated a period of getting to understand CalSAWS processes, norms, vocabulary and culture. It also provided opportunities to bring different perspectives and ways to engage with the Consortium and our Contractor partners.

As we anticipate onboarding additional team members to address new scope of services and the next evolution of BenefitsCal, it is especially crucial that our existing team helps them understand the One Team culture. That includes understanding that external stakeholders should not need to understand the different Contractor

#### DISTINGUISHING FACTORS



##### BenefitsCal Experience

- 4+ years leading communications across contractors to create alignment for prioritization and other supporting services.
- Collaboration with multiple contractors to drive best practices to create unified processes to better service Californians.
- Creating end to end process across contractors for Help Desk support of BenefitsCal operations.



organizations: an understanding where Contractors leave their individual team badges at the door.

This environment stresses proactive collaboration, coordination, and communication as the Consortium and CalSAWS Contractors act as a unified team to deliver better outcomes for Customers, Counties, CBOs and other CalSAWS stakeholders. It involves understanding that there are times to lead and times to play the role of a supporting cast mate whether it is working with the Technical Service Desk to troubleshoot an issue live with a Customer, coordinating responses for Quarterly Stakeholder meetings or sharing feedback from Customers that have impacts on the Hyland imaging system or CalSAWS Core. Being a Contractor at CalSAWS demands owning your space, while also assisting and seeking perspective from others as well.

We work side-by-side with CalSAWS's Contractors, IV&V, Interface partners, and the Consortium. We are prepared to adopt the new DI framework, which enables us to consistently apply system engineering and integration principles and best practices. Our commitment remains strong to delivering high-quality work that helps the CalSAWS Consortium achieve its vision and brings tangible benefits to Californians.

### **Factors Contributing to a Successful Multi-Contractor Environment**

Much is at stake if there are breakdowns in the multi-contractor environment. Every day Californians rely on our CalSAWS community to keep CalSAWS systems stable, accessible, secure, accurate and performant when they are reaching out for services at vulnerable times in their lives. With BenefitsCal as the primary public facing channel for Californians to access services, it is even that more critical that the multi-contractor environment operates smoothly from the integration with the Identity and Access Management solution at login to being able to view the latest case information received from CalSAWS.

In a multi-contractor environment, we navigate a complex matrix of interdependencies and potential challenges, such as prioritization mismatches and overlapping responsibilities. We also face dependencies on one other when needing to supply data regarding system usage and impact for a County Board of Supervisors meeting, Quarterly Stakeholder Meetings or fielding other inquiries. Our ongoing commitment is to evolve our current practices, enhancing our ability to foster a highly effective multi-contractor setting. This commitment is pivotal to building a collaborative and transparent operational framework. Below, we identify critical success factors relative to the Delivery Integration (DI) framework and verify we are in alignment with the concept of working collectively and collaboratively for the good of CalSAWS. These activities are designed to strengthen and maintain cooperative relationships, aiming to elevate our collective performance for optimal outcomes.



Table 4.1-1 summarizes our identified success factors inherent in the multi-Contractor delivery environment and our proposed activities to help foster this environment.

Success Factors	Description	Activities for Ongoing Success
<b>Communication and coordination</b>	A successful multi-Contractor environment requires streamlined communication between different Contractors who might have different organizational cultures and ways to communicate.	<ul style="list-style-type: none"> <li>Continuously refine our communication strategies by integrating Contractor feedback and lessons learned from the past four years, aiming to consistently align our methods with Consortium expectations.</li> <li>Enhance current collaboration and coordination efforts across Contractors to align with the Consortium's DI framework.</li> <li>Continuously evaluate communication channels to identify what is working and what may require change to increase communication and coordination as we have done with the Technical Service Desk Contractor in weekly BenefitsCal Operations meetings.</li> <li>Embody a culture of representing the CalSAWS One Team mindset in external/public meetings as external parties do not distinguish between teams or systems.</li> <li>Continue use of a consistent communication tool across Contractors (e.g., Teams channels).</li> </ul>
<b>"One team" connection</b>	We grow and enhance Contractor relationships across teams to deliver work as a unified team to Consortium and stakeholders.	<ul style="list-style-type: none"> <li>Establish networking events for team members across Contractors for team building.</li> <li>[REDACTED]</li> <li>Host Contractor summits to review accomplishments involving multiple Contractors and identify opportunities to enhance processes and communications across different Contractor groups.</li> </ul>
<b>Joint Visioning and Solutioning</b>	BenefitsCal, CalSAWS Core and other systems (e.g., imaging) are inextricably linked. To increase the effectiveness and impact of our solutions we execute joint solutioning efforts and visioning	<ul style="list-style-type: none"> <li>Conduct joint SCERFRA/SIRFRA conceptual design sessions with the CalSAWS M&amp;E and CalSAWS Infrastructure Contractors and the Consortium to minimize back and forth and define a more complete solution.</li> </ul>



Success Factors	Description	Activities for Ongoing Success
	sessions including how we measure success.	<ul style="list-style-type: none"> <li>• Execute joint Discovery sessions in local County offices with our collective Research Teams (i.e., CalSAWS Infrastructure, CalSAWS M&amp;E and BenefitsCal) to represent end to end perspective of County operations.</li> <li>• Bring together individual CalSAWS Contractor alliances to jointly bring issues to closure in an accelerated way.</li> <li>• Execute joint Proofs of Concept to advance user experiences, evolve technologies and enhance operations.</li> <li>• Jointly defining objectives and key results (OKRs) to measure impact of the CalSAWS enterprise relative to programmatic and operational outcomes.</li> </ul>
<b>Effective conflict resolution mechanisms</b>	We implement proactive and effective conflict resolution strategies to address disputes swiftly and fairly between Contractors to continue unified support for BenefitsCal.	<ul style="list-style-type: none"> <li>• Work with the DI Team to review current multi-Contractor processes and work schedules to verify alignment with the DI framework and Consortium vision.</li> <li>• Establish a time-bound workflow for conflict resolution and reach a consensus to streamline the process.</li> <li>• Continuously assess and improve the unified incident response plans in place among Contractors.</li> <li>• Proactively assess risk and develop mitigation plans collaboratively to avoid widespread issues.</li> </ul>
<b>Well-defined roles and responsibilities</b>	We clearly define the scope of work, roles, and responsibilities for each Contractor to maximize their expertise. We uphold high standards of quality and adhere to industry best practices so that final deliverables meet expected quality.	<ul style="list-style-type: none"> <li>• Clarify scope management and roles and responsibilities in M&amp;O and SCR processes with other Contractor teams.</li> <li>• Involve Counties and Regional Managers in the SCR implementation timeline with Operational Readiness, Training, OCM, and demos.</li> <li>• Organize and prioritize the project schedule by identifying dependencies during the planning phase.</li> <li>• Define clear boundaries for security and performance SLAs to avoid overlaps.</li> <li>• Delineate tasks across Contractors and identify cross-team dependencies early including dependencies on data for reporting outcomes.</li> </ul>



Success Factors	Description	Activities for Ongoing Success
		<ul style="list-style-type: none"> <li>• Continue to hold “table reads” to collaboratively review integrated plans to uncover previously unidentified dependencies.</li> <li>• Engage with Contractors using DI framework to align on facts and assumptions, and trace requirements in a central repository.</li> </ul>
<b>Effective schedule management</b>	We support and promote continuous improvement as needed to a comprehensive and transparent scheduling system and help Contractors to adhere to it. This allows effective progress tracking and timely adjustments to help each Contractor's timeline and progress.	<ul style="list-style-type: none"> <li>• Continue work with other Contractors for end-to-end OCM activities to prepare Counties and Regional Managers for upcoming changes</li> <li>• Establish dependencies and dependent task schedules during planning phase.</li> <li>• Conduct integrated readiness coordination during M&amp;O bi-weekly meetings to coordinate release schedules and notes with Contractors.</li> <li>• Collaboratively decide the timing of implementation during prioritization for sufficient support from the required teams.</li> <li>• Clearly establish dependencies and schedules of dependent tasks during the planning phase to minimize delayed handoffs during execution.</li> <li>• Perform impact analysis upfront for new changes introduced to identify team dependencies with the Contractors.</li> <li>• Coordinate with Contractors to schedule maintenance during times of minimal use when unplanned urgent upgrades happen.</li> </ul>

**Table 4.1-1. Success Factors for Executing in the CalSAWS Multi-Contractor Environment.**

## 4.1.1 Managing Our Scope of Work

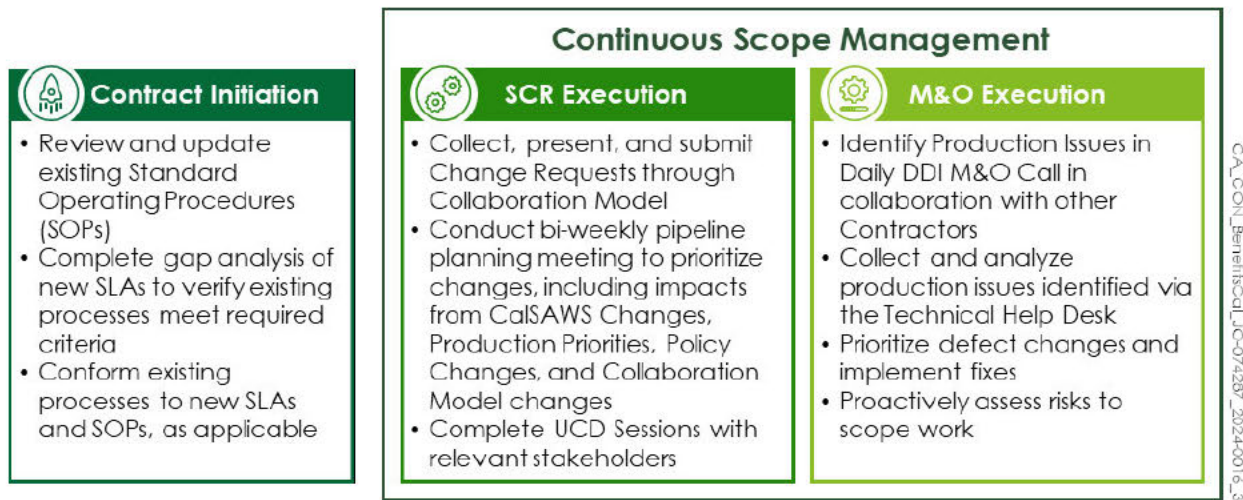
### 5.2.3.1 Understanding and Approach to the CalSAWS Integrated Multi-Contractor Environment

UAI

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.

Our approach to managing our scope and coordinating with other CalSAWS Contractors and the CalSAWS DI Team is rooted in an approach that recognizes the need to continuously evolve with collaboration at the center. This keeps stakeholders informed and involved, enabling the BenefitsCal team to deliver the best services to Californians. We clearly understand and define roles and responsibilities for the Deloitte team, other Contractors, and the Consortium to align and manage scope for BenefitsCal.

As the project and initiatives begin, it is important that the Contractors manage their scope of work while collaborating with other Contractors. Figure 4.1-1 details our approach to managing the scope of work, which begins with understanding the scope relative to the new contract and then continually managing scope during BenefitsCal operation and subsequent enhancements.



**Figure 4.1-1. Continuous Scope Management.**

### Managing and Coordinating Scope During Contract Initiation

Today, our team reviews the new SLAs against our current performance and already takes steps for the required realignments. We review the most current BenefitsCal processes prior to new contract initiation, new key staff roles, and revised enterprise level documents (e.g., the Enterprise Project Control Document) and verifying that these processes align with the scope defined in the new contract. This analysis includes how we communicate and integrate across CalSAWS's multi-contractor environment. The following are key activities built on our contract transition experience in the State of California and experience as the current BenefitsCal Contractor:

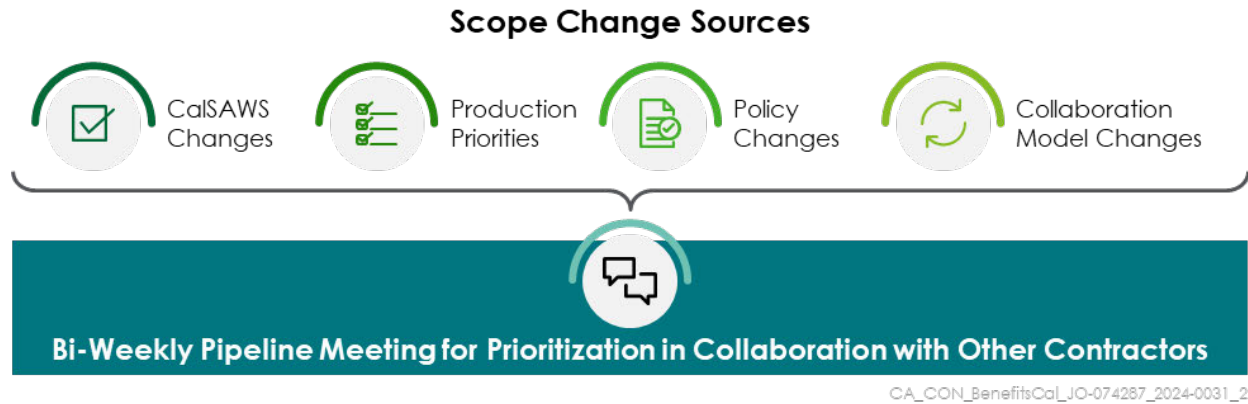


- Review and update existing Standard Operating Procedures (SOPs)
- Streamline communication for SCRs, releases, and updates, adapting to new CalSAWS contractors and Consortium team members and building on four years of BenefitsCal experience
- [REDACTED]
- Review and confirm stakeholder register
- Update the BenefitsCal Services Plan and OWDs to reflect changes with the new scope of work. *Note: Changes to existing OWDs tied to changes in CalSAWS Contractors for M&E and Infrastructure will be completed as part of the current BenefitsCal contract.*
- Re-visit the Risk Register with other CalSAWS Contractors to review and confirm existing risks. *Note: this review is done on an ongoing basis as part of the existing BenefitsCal contract. Any new risks stemming from new scope of services will be presented prior to contract execution as part of transition in walkthrough sessions.*
- Compare existing SLAs to new SLAs to validate existing processes on BenefitsCal meet any new SLA criteria. *Note: this comparison will be done as part of the current BenefitsCal contract in anticipation of the new SLAs and performance targets.*
- Conduct transition in walkthrough sessions with the Consortium and CalSAWS Contractors prior to contract execution to align expectations
- Clearly document and communicate overall Contractor scope, roles, and responsibilities in line with the DI framework

These actions during contract initiation allow us to re-baseline activities and scope, facilitating efficient management throughout the project's lifecycle. With established scope management processes, our team can minimize transition efforts and focus more on working within the DI framework and handling SCRs from day one. The subsequent sections detail our management and coordination of SCR and M&O scope during project execution, with clearly defined roles and responsibilities. Our Transition Manager, Mike Henry, works closely with the Consortium Transition Manager, the BenefitsCal Project Manager and other CalSAWS Contractor designees to plan, coordinate and execute transition in activities.

### Managing and Coordinating SCR Scope During Execution

After completing contract initiation activities, our team continues operations and starts closely managing SCR scope in collaboration with the Consortium, other Contractors, and other key stakeholders. Figure 4.1-2 details the avenues for SCR scope changes. These are prioritized in the bi-weekly pipeline meeting in collaboration with other Contractors.



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**Figure 4.1-2. Bi-Weekly Pipeline Call to Manage Prioritization and SCR Scope.**

We perform the following activities for managing and coordinating the scope of SCRs with stakeholders and Contractors:

- Collect, present, and submit SCRs through the Collaboration Model (CM)
- Hold bi-weekly meetings to prioritize pipeline changes, including impacts from CalSAWS, production, policy, and CM updates
- Work with stakeholders to identify impacted user groups, County workers, and CBOs
- Complete User-Centered Design (UCD) session(s) with relevant stakeholders
- Work with other Contractors to identify cross-team dependencies and refine the stories requiring joint ownership together
- Regularly meet with other vendors to coordinate changes and impacts of SCERFRA and SIRFRA changes to BenefitsCal and CalSAWS Core
- Jointly conduct Proofs of Concept to evaluate new capabilities
- Validate proposed designs with Counties, customers, and stakeholders through recruitment to assess needs during the UCD process
- Perform estimations on the level of effort needed for each activity
- Develop a timeline for implementation considering the level of effort and the cross-Contractor dependencies
- Execute joint solutioning sessions inclusive of alliance partners (e.g., AWS, ForgeRock or Google)
- Document and share the Work Plan with Contractors and stakeholders, serving as input for the Consortium's Integrated Work Plan
- Upon change prioritization, assign resources and circulate a contact list among Contractors for coordination
- Hold CM Quarterly stakeholders Meetings for stakeholders to bring enhancement ideas, risks, issues, and current enhancements statuses
- Conduct monthly UCD meetings with stakeholders, including Counties, regional managers, State partners, CWDA, advocate groups, and the Consortium for discovery sessions
- Conduct webinars on major enhancements with Contractors, and provide FAQs and release notes to Counties and state partners for preparation



## Sources of Scope Changes

When a change is identified in the multi-Contractor environment via the SCR process, as shown in Table 4.1-2, this may impact other Contractors. We work with the relevant stakeholders and Contractors to identify scope impact and work together to modify timelines, effort estimations, and other areas impacted to finalize scope changes and overall impact to the CalSAWS project.

Source	Relevant stakeholders & Contractors involved	SCR Scope Impact
<b>CalSAWS Change</b>	<ul style="list-style-type: none"> <li>• CalSAWS Infrastructure</li> <li>• CalSAWS M&amp;E</li> <li>• EBT</li> <li>• Consortium</li> <li>• QA</li> <li>• BenefitsCal</li> </ul>	CalSAWS modifications can affect BenefitsCal due to system-wide repercussions. We collaborate with CalSAWS Contractors and State partners to assess and implement approved changes. For significant enhancements, we jointly host webinars and develop FAQs, support materials, and release notes for Counties and State partners. For instance, we worked with the CalSAWS document management system Contractor to integrate the CF 385 form into the Form API, enabling its population in the document management system.
<b>Production Priorities</b>	<ul style="list-style-type: none"> <li>• Consortium</li> <li>• QA Team</li> <li>• BenefitsCal</li> <li>• CalSAWS M&amp;E</li> <li>• CalSAWS Infrastructure</li> <li>• Technology Vendors (e.g., SaaS products)</li> </ul>	The Consortium, Counties, State, and other stakeholders determine production priorities. We collaborate with the Consortium and QA team to identify these priorities during bi-weekly pipeline planning meetings. For instance, our team led the effort to establish integrated training environment for Counties and CBOs across BenefitsCal and CalSAWS Core with data exchanges and additional services that counties requested.
<b>Policy Changes</b>	<ul style="list-style-type: none"> <li>• Consortium</li> <li>• QA Team</li> <li>• BenefitsCal</li> <li>• Counties</li> <li>• State Partners</li> <li>• Advocate Groups</li> <li>• CalSAWS M&amp;E</li> <li>• CalSAWS Infrastructure</li> </ul>	Policy changes require collaboration among stakeholders. When State Partners inform us of changes, we work with the Consortium using SCERFRA/SIRFRA processes to create an SCR and gather details from relevant parties. We hold monthly UCD sessions with stakeholders including Counties, State partners, and advocacy groups to align BenefitsCal updates with CalSAWS policies. For example, we digitized the EBT 2259 process in BenefitsCal, allowing customers to report electronic theft of benefits.
<b>Collaboration Model Change</b>	<ul style="list-style-type: none"> <li>• Consortium</li> <li>• QA Team</li> <li>• BenefitsCal</li> <li>• Counties</li> <li>• State Partners</li> <li>• Advocate Groups</li> <li>• Student Organizations</li> <li>• CWDA</li> </ul>	The CM serves as the governance body that prioritizes customer-facing SCRs, which are voted on by its stakeholders. We work with other Contractors to confirm that changes presented are comprehensive, addressing impacts on both BenefitsCal and CalSAWS. Additionally, during CM Quarterly Meetings, stakeholders discuss enhancement items, including progress.



Source	Relevant stakeholders & Contractors involved	SCR Scope Impact
	<ul style="list-style-type: none"> <li>Customers</li> <li>CalSAWS M&amp;E</li> </ul>	timelines, risks, issues, and current statuses. For instance, we enhanced the document type/upload feature to allow customers to select the correct document type, facilitating accurate routing at the County level for improved customer support.

**Table 4.1-2. Managing SCR Scope for Stakeholders and CalSAWS Contractors.**

Our extended SCR team spanning PMO, Testing, Application, UCD, Security, Communications, Training, Change Management, and Architecture have or will have experience with BenefitsCal and CalSAWS prior to contract start including key staff members that are joining our team. Forming connections early on helps our collective teams navigate through the SCR process with the aim of addressing County, Consortium and public requests to accelerate the delivery of changes and thereby accelerate the impact.

### Managing Scope During the SCR's Software Development Life Cycle (SDLC)

Throughout the SDLC, our team continues to manage the scope of SCRs through a collaborative process with the Consortium and other CalSAWS Contractors. Table 4.1-3 outlines how we manage SCR scope throughout the SDLC process.

SDLC Phase	How SCR Scope is Managed
<b>Dream</b>	<ul style="list-style-type: none"> <li>Identify stakeholders and CalSAWS Contractors, including other CalSAWS Contractors, Counties, and State stakeholders; establish a cadence for communications that addresses SCR-specific needs</li> <li>Initiate planning with an all-inclusive scope document agreed to by CalSAWS Contractors and stakeholders, including objectives, implementation milestones, and deliverables</li> <li>Work with Contractors to review and enhance the current BenefitsCal Marketing and Public Communications Plan</li> </ul>
<b>Discover &amp; Define</b>	<ul style="list-style-type: none"> <li>Hold collaborative requirements sessions with relevant Contractors and stakeholders and agree on requirements</li> <li>Verify that scope is agreed on by relevant parties to formalize the agreement on scope and document key decisions</li> <li>Document requirements in requirement management document reviewed by impacted parties</li> <li>Engage other CalSAWS Contractors when planning media outreach events and review readiness for each area for impacts (e.g., increase in volume of application processing or a disaster SNAP event)</li> </ul>
<b>Design &amp; Deliver</b>	<ul style="list-style-type: none"> <li>Follow formal feedback channels and change control processes that include CalSAWS Contractors and necessary stakeholders if a scope change is necessary during development</li> <li>Conduct regular UCD Review meetings with relevant stakeholders and CalSAWS Contractors to validate the proposed design and collect input</li> </ul>



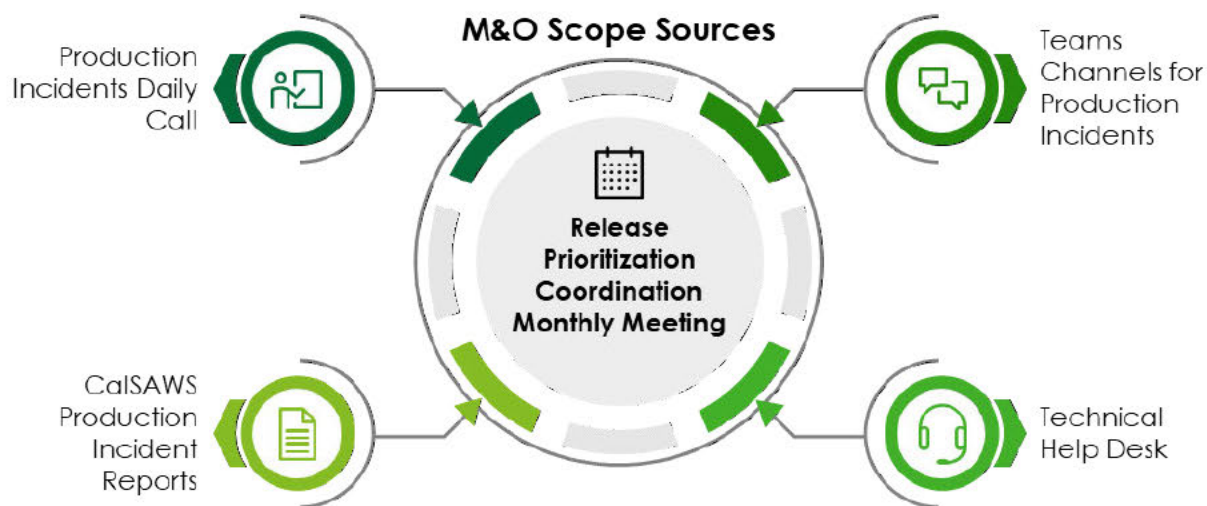
SDLC Phase	How SCR Scope is Managed
Develop & Deploy	<ul style="list-style-type: none"> <li>Establish a process for regular scope monitoring and reporting that includes Contractors to detect any deviations early, especially in data exchanges</li> <li>Organize a quarterly meeting as part of the CM for stakeholders to present enhancement ideas, discuss risks and issues, and provide updates on the status of current enhancements</li> <li>Coordinate testing activities across different Contractors and State stakeholders to verify components are integrated according to scope requirements</li> <li>Implement feedback from stakeholders during testing to make necessary modifications prior to final approval from stakeholders</li> <li>Develop unified deployment strategy that involves relevant Contractors, including CalSAWS Contractors, to verify each understands required roles and responsibilities during deployment</li> <li>Coordinate training, webinars, and release communications to end users and Counties to verify relevant end-users are prepared for changes</li> <li>Create joint plan for reporting outcomes that span the CalSAWS enterprise given dependencies on data between systems</li> </ul>

**Table 4.1-3. Managing SCR Scope for Releases.**

Through these activities, we clearly define the work to be done by our SCR team and identify cross-team dependencies. These preparations lay a strong foundation for the teams to manage their scope during execution.

### Managing and Coordinating M&O Scope During Execution

Our focus during M&O execution is on actively managing the scope of our work while collaborating with other Contractors. Figure 4.1-3 illustrates the areas that contribute to and control the M&O scope. Each area/activity results in an incident being proposed to be fixed at the Release Prioritization Coordination Monthly Meeting.



**Figure 4.1-3. M&O Scope for Release Prioritization.**

Figure 4.1-3 displays four different sources for input into M&O scope and priorities. We detail each M&O Scope Source below and the method by which we engage in the multi-Contractor environment:

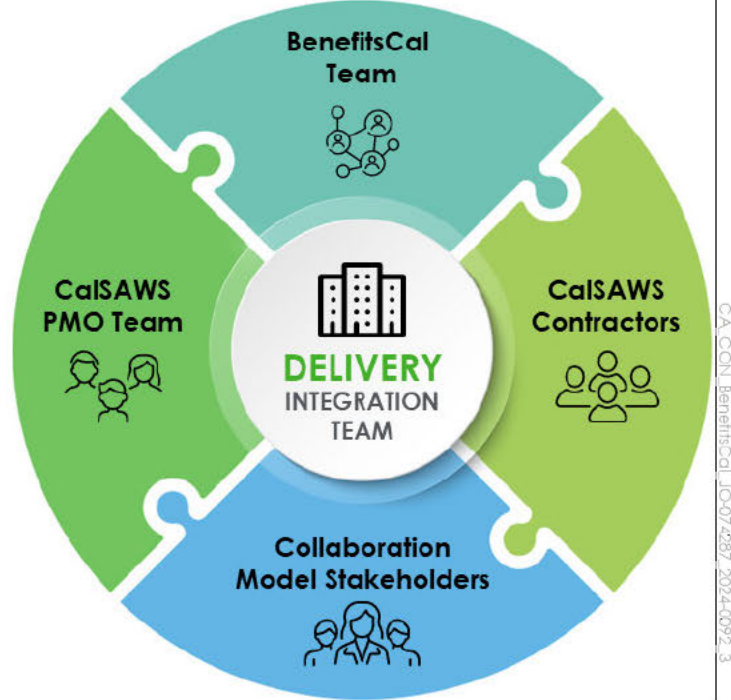
- **Production Daily Incident Calls:** Our team holds daily production incident calls with Contractors, including the CalSAWS Contractor, document management system Contractor, EBT Contractor, identity management system Contractor, and Amazon Web Services. These calls allow Contractors to discuss issues within their systems or with BenefitsCal interactions. Identified issues are then presented as SCR changes to the Consortium.
- **Teams Channel for Production Incidents:** The M&O scope change process mirrors that of Production Daily Incident Calls. The Teams Channel allows Contractors to report production incidents potentially leading to scope changes. We routinely review these incidents and schedule meetings for critical issues as necessary.
- **CalSAWS Production Incident Reports:** The CalSAWS Contractor regularly generates a report detailing various incident statistics, such as transaction failure rates for applications sent from BenefitsCal to CalSAWS. When these incidents are reported, our team works with the CalSAWS Contractor to triage and resolve the incident (e.g., manually processing a failed application from BenefitsCal to CalSAWS). We also work with the CalSAWS Contractor to identify the root cause of any issue and create a plan of action to implement a long-term fix.
- **Technical Service Desk:** When an incident is reported to the Technical Service Desk, our team triages it and formulates a resolution plan. We proactively engage with the Help Desk to clarify customer and County queries, guiding our review of the BenefitsCal system and identifying knowledge gaps. With Consortium approval we also engage directly with Customers and CBOs to bring swift closure to incidents that require Tier 3 support. Through the UCD process, we collaborate with our UI/UX team to pinpoint effective changes and prioritize SCRs via the CM process when necessary.

Our BenefitsCal Production Operations Team is very familiar with the existing processes and individuals engaged in supporting the CalSAWS enterprise production operations. Our team members bring continuity to maintain the stability and performance to which CalSAWS has become accustomed including no downtimes since BenefitsCal was implemented in 2021. That same team has also continuously maintained a very low production incident backlog for both triage as well as resolution since implementation in 2021.



## Aligning with the Delivery Integration Framework

The DI framework is an established set of guidelines, practices, and tools to effectively manage processes for BenefitsCal and other Consortium systems in the multi-Contractor environment. Our team helps refine DI processes and procedures in collaboration with the Consortium and other Contractors to effectively serve Counties, customers, and Community-Based Organizations (CBOs). To continue the effectiveness of the DI framework, we have listed our understanding of the key roles and responsibilities of the BenefitsCal team, CalSAWS PMO team, CalSAWS Contractor, and the DI Team. We are active participants and collaborate with the Consortium and other



**Figure 4.1-4. Delivery Integration Team.**

CalSAWS Contractors in the operation of the DI framework as shown in Figure 4.1-4.

Our team collaborates within the DI framework alongside the CalSAWS Contractor, CalSAWS PMO Team, and DI Team to identify and propose effective enhancements for BenefitsCal. Table 4.1-4 details the roles and responsibilities of each team mentioned.

Stakeholder	Roles and Responsibilities within the DI Framework
<b>BenefitsCal Team</b>	<ul style="list-style-type: none"> <li>• Closely coordinate and work collaboratively with other CalSAWS Contractors</li> <li>• Participate in governance structure and processes set up in DI framework in an integrated multi-Contractor environment</li> <li>• Incorporate DI principles and best practices</li> <li>• Collaborate with other CalSAWS Contractors to identify and develop recommendations to resolve any service gaps, conflicts, and overlaps and present to the DI Team for consideration and action</li> <li>• Oversee and perform maintenance, operations, and enhancements for BenefitsCal</li> <li>• Provide change management support</li> <li>• Contribute to the Change Advisory Board (CAB) process</li> </ul>
<b>CalSAWS PMO Team</b>	<ul style="list-style-type: none"> <li>• Review any contract amendments and changes</li> <li>• Define new process and refine existing process to align with DI framework</li> </ul>
<b>CalSAWS Contractor</b>	<ul style="list-style-type: none"> <li>• Assess Work Plans with a focus on start and finish dates, level of effort, resource loading, estimates to complete, and estimate at completion</li> <li>• Collaborate with BenefitsCal Contractor to provide holistic view to stakeholders</li> </ul>



Stakeholder	Roles and Responsibilities within the DI Framework
<b>Delivery Integration Team</b> <ul style="list-style-type: none"> <li>• CalSAWS Chief Deputy Director</li> <li>• Members of Consortium</li> <li>• BenefitsCal Contractor</li> <li>• CalSAWS Contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Build and maintain an integrated, consolidated CalSAWS Master Work Plan that includes the BenefitsCal M&amp;O Work Plan/schedule</li> <li>• Identify and resolve conflicting tasks, priorities, and resources on the consolidated CalSAWS Master Work Plan</li> <li>• Coordinate discussion for each Contactor and the Consortium for design, build, test, and implementation processes</li> <li>• Coordinate with the leaders of the Release Management processes regarding entry and exit criteria in system change processes</li> <li>• Provide input and recommendations to determine overall release content</li> <li>• Develop and implement new governance processes that promote full integration of Contractor and Consortium teams</li> </ul>

**Table 4.1-4. Roles and Responsibilities.**

Although this list is not inclusive of all potential Contractors and stakeholders our team may need to interact with, it provides a strong baseline to understanding our team's role within the multi-Contractor environment.

### Communicating within the Collaboration Model

We work within the CM to gather enhancements for BenefitsCal from Customers, State Partners, advocates, CBOs, Counties, CWDA, and SEIU. Each channel offers a unique opportunity to enhance the system. As an authorized source for submitting SCRs, we aim to incorporate feedback from the entire stakeholder ecosystem to propose the most beneficial changes. Table 4.1-5 highlights the communication avenues for different stakeholder groups.

Stakeholder Group	Avenues for Collecting Information
<b>Customers</b>	Small Group Sessions, BenefitsCal Technical Help Desk, CX Reports, Always on Survey, Focus Groups
<b>County, CWDA, SEIU</b>	Small Group Sessions, CM Meetings
<b>Advocates/CBOs</b>	Small Group Sessions, CM Meetings
<b>State Partners</b>	Policy Guidance, Small Group Sessions, CM Meetings

**Table 4.1-5. Avenues for Collecting Information.**

After collecting information through each of these avenues for different stakeholders, we submit SCRs on a quarterly basis to be reviewed and confirm that the SCR meets defined criteria. We then discuss these SCRs at the quarterly CM meeting, where they are reviewed and dispositioned appropriately.

In addition to the avenues listed above, our team engages in on-demand work group sessions, forming groups with relevant stakeholders for new features or policies. For instance, we participated in the Release of Information Work Group, which facilitated secure access for CBOs to comprehensive customer information, enhancing their ability to assist in various scenarios beyond application processes. This involvement underscores our commitment to collaborating with any contractor or stakeholder to enhance BenefitsCal effectively.



Whenever a new change is considered within the CM, it is essential to assess opportunities with other CalSAWS Contractors to evaluate systems to create innovations across the CalSAWS ecosystem. Our team actively prioritizes a collaborative approach, working collectively for the benefit of the entire enterprise, instead of solely for BenefitsCal. We accomplish this through continual input from stakeholder groups before presenting an SCR at the quarterly meeting.

4.1.2 Collaborating with CalSAWS M&O Contractor(s) to Perform Shared Services and Supporting Services

5.2.3.1 Understanding and Approach to the CalSAWS Integrated Multi-Contractor Environment

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.

Shared services and supporting services play pivotal roles in the effective operation of BenefitsCal, as shown in Figure 4.1-5. Shared activities are during the SDLC that require coordination with contractors to identify, develop, test, deploy and other activities to implement changes and improvements. Supporting services involve collaborating with other CalSAWS contractors to monitor and manage production incidents, offer help desk support, and conduct other activities that aim to optimize the experience for BenefitsCal users including jointly generating and sharing OKRs to represent outcomes tied to usage of adoption channels in relation to BenefitsCal. CalSAWS M&E and Infrastructure Contractors are critical to providing a holistic view of outcomes that drive perception and adoption of BenefitsCal given essential integrations (e.g., imaging and IdAM) and also housing the core CalSAWS data.



Figure 4.1-5. Shared Services and Support Services.

Our team supports the CalSAWS vision by promoting trust, collaboration, and transparency among contractors to provide an innovative and reliable system for the ecosystem's customers and stakeholders. We uphold this commitment through our M&O and SCR processes, aligning with the Consortium's vision and the DI framework. Effective communication and collaboration are crucial in our multi-contractor environment to meet the Consortium's goals and enhance the DI framework. Our success is measured by BenefitsCal's smooth operation and continual innovation, improving the user experience for Californians using these programs. These services are consistently delivered and maintained across multiple contractors.

By establishing a DI team, we have evaluated our existing processes and procedures that provide and support services. These services are currently being delivered and will

continue in a multi-Contractor environment. These align with the DI framework and intent that provides effective and relevant interactions between Contractors.

Our continued partnership with other CalSAWS Contractors is built on effective communication, transparency, and a shared objective of serving tens of millions of vulnerable Californians. The details of the work we have performed and are committed to continuing are provided in the following pages of this response.

### Collaborative Communication Supports Shared and Supporting Services

Collaborative communication exists for BenefitsCal today. Our team works with CalSAWS Contractors across production incident monitoring and triaging, design and testing integration, performance, Service Desk support, security integration, and environment planning. As depicted in Figure 4.1-6, we have established and proven communication and coordination methods to bring transparency to Contractors and opportunities for collaboration and integration for M&O and SCR processes.



**Figure 4.1-6. Current Communication and Coordination with Contractor.**

Our communication processes provide a method for communication to exist across Contractors and for them to work together to resolve issues by benefiting from each other's breadth and depth of knowledge. For example:

- We worked jointly to address potential security risks through the identity management process.
- For system performance, the BenefitsCal teams use an end-to-end approach and associated volumetrics to test and monitor end-to-end system performance and communicates findings and issues with other Contractors to collaborate on future improvements.
- Our teams meet weekly to review ongoing operations and discuss any Tier 3 incidents not designated as priority items.
- Dedicated Teams channels are used to provide production alerts across Contractors to quickly engage the teams to work together to resolution.

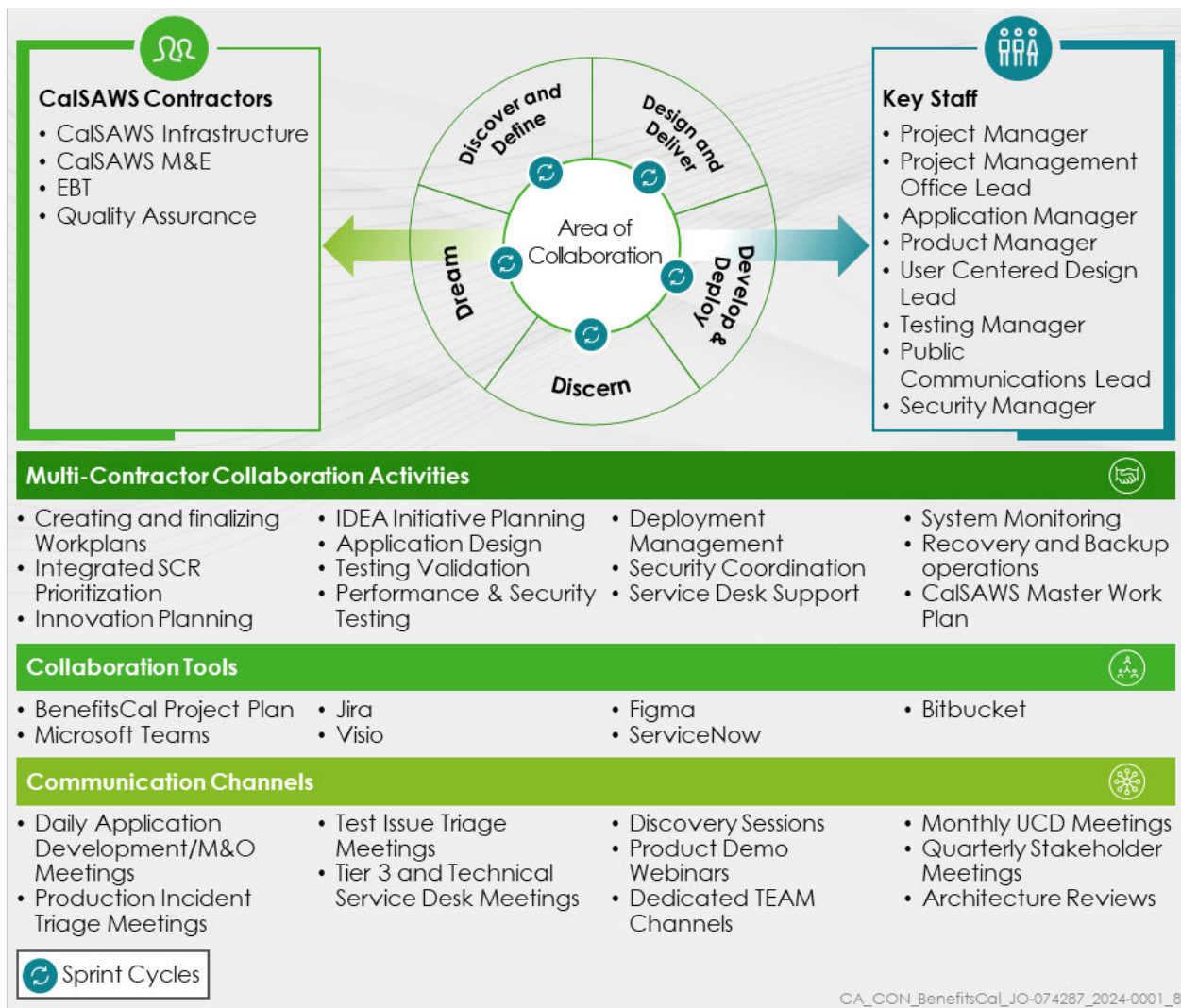


## Security Coordination

Deloitte is committed to fostering a collaborative, robust, and integrated security environment for BenefitsCal and the overall CalSAWS enterprise. Our security approach aligns with the Consortium's guidelines and is informed by our past collaborations with the Consortium and CalSAWS M&O Contractors. We detail our security coordination strategy in Section 4.1.2, covering relevant phases and activities.

## Performing Shared Services

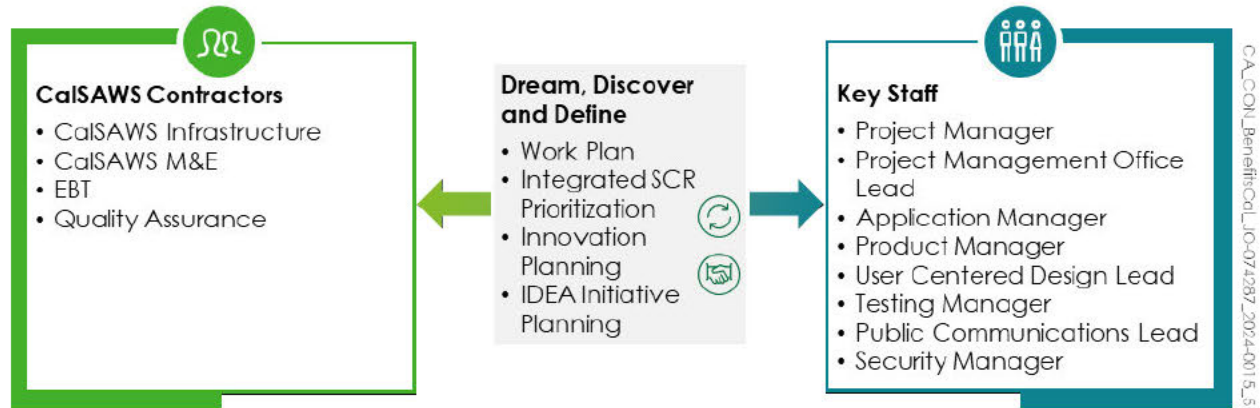
Figure 4.1-7 describes our approach to performing shared services during various phases of software delivery and depicts how key staff for the BenefitsCal team closely collaborate with CalSAWS Contractors through planning, design, development and testing, deployment, and operations for BenefitsCal. Further, our team collaborates closely with interface partners during development and operations.



**Figure 4.1-7. Cross-Team Collaboration to Perform Shared Services and Support Services.**

## Dream, Discover, & Define

During the Dream and Discover & Define phases, key staff work with other Contractors to review and confirm Work Plans, review integrated SCR prioritization process to verify this process and any necessary updates, and add activities for collaboration for plans to complete the Innovation and IDEA Initiative as shown in Figure 4.1-8.



**Figure 4.1-8. Shared Dream, Discover & Define Activities.**

## Work Planning

Work Planning consists of the activities to be performed to set the stage for overall activities and collaboration for the multi-contractor integration in the Table 4.1-6 below:

Work Planning	
<b>Tasks</b>	<ul style="list-style-type: none"> <li>Highlight various dependencies between the tasks and teams, along with milestones such as dev/test completion, cutover, and deployment</li> <li>Define details to help baseline the plan of execution and track progress</li> <li>Perform the following tasks with the CalSAWS Contractors to reconfirm and improve the Work Plan</li> <li>Conduct project kickoff meetings for new initiatives to align the stakeholders and set expectations for the teams</li> <li>Continue roadmap planning meetings to update and refine the product enhancement roadmap to support innovation planning and identify cross-team dependencies up front</li> <li>Identify tasks requiring joint ownership and set up a plan for periodic touchpoints for the teams to allow continuous collaboration for prioritized SCRs</li> <li>Continue SCR coordination processes to set up common timelines and agree on milestones; establish points of contact for the involved stakeholders to ease cross-team communication for new SCRs</li> <li>Revisit the Integrated Work Plan in a common project management tool and share with the Contractors and stakeholders to re-confirm agreements</li> </ul>

**Table 4.1-6. Work Planning Tasks.**

Our team performs Configuration Management for BenefitsCal configuration items. These are coordinated and reviewed with the Consortium and other CalSAWS Contractors as applicable to re-visit existing documentation and update accordingly. If



new configuration items are needed, we share and review with the Consortium and other CalSAWS Contractors to confirm agreement and buy-in.

### Integrated SCR Prioritization

With multiple Contractors owning different systems that interface with BenefitsCal, it is imperative we continue to collaborate on the prioritization of SCRs to avoid any negative impact to BenefitsCal. We perform the tasks shown in Table 4.1-7 to effectively deliver integrated SCR prioritization.

Integrated SCR Prioritization	
<b>Tasks</b>	<ul style="list-style-type: none"> <li>• Review backlog SCRs between CalSAWS Contractors and the BenefitsCal teams</li> <li>• Review the breakdown of SCRs to delineate the scope of each Contractor</li> <li>• Agree on shared SCRs needing joint ownership and set up communication and conflict resolution processes for management of SCRs</li> <li>• Finalize agreement for release and timeline prioritization for SCR for BenefitsCal and other Contractors</li> </ul>

**Table 4.1-7. Integrated SCR Prioritization.**

### Innovation Planning

Innovation planning is the path forward, but it cannot be done alone or in silo in a multi-Contractor environment. Our team works with other Contractors to identify and understand the best and most effective improvements to the CalSAWS ecosystem to best serve Californians and the Counties that support them. We collaboratively plan with other Contractors using the DI framework. Figure 4.1-9 provides the flow of innovation planning and idea generation across Contractors to implementation.



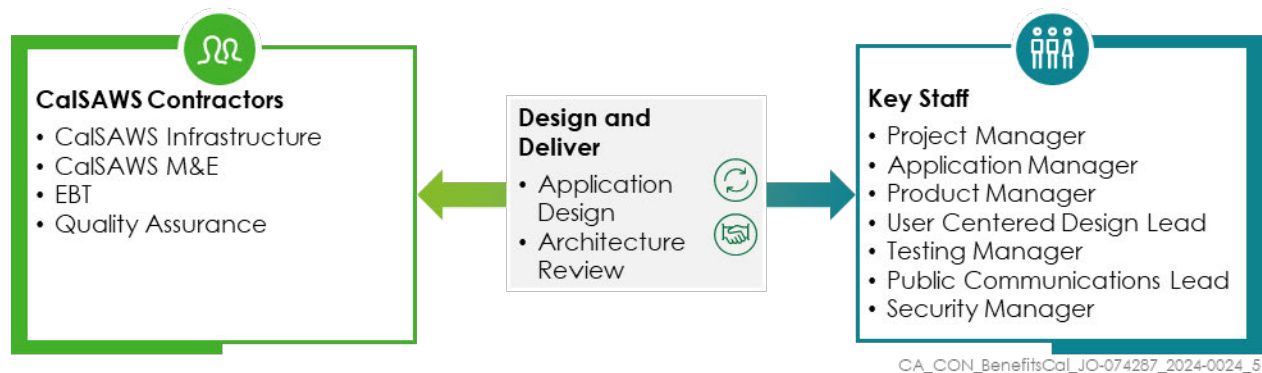
**Figure 4.1-9. Innovation Planning.**

## Inclusion, Diversity, Equity, Advancement (IDEA) Initiative Planning

Deloitte's DEI program enhances commitment and participation among contractors. We plan to actively collaborate with the Consortium and CalSAWS Contractors on cultural transformation and IDEA initiatives. Our existing DEI team is prepared to develop materials and host activities to advance this crucial initiative.

## Design & Deliver

Once planning is successful, we collaborate with the CalSAWS's Contractors during design. We engage key staff, including the Delivery Integration Manager, CalSAWS Contractors, and Deloitte key staff on the activities highlighted in Figure 4.1-10.



**Figure 4.1-10. Shared Design and Deliver Activities.**

## Application Design

Application design can pertain to both BenefitsCal changes and other interconnected systems. We collaboratively review application designs with CalSAWS Contractors for the changes we own and supporting systems changes owned by other Contractors. We perform the following tasks to develop designs and identify cross-team impacts early:

- Review application functional and technical design with other Contractor teams during Discovery sessions
- Identify cross-team impacts and any support needed from other Contractor teams to support application development
- Review the application technical design and identify CalSAWS Contractor support needed early on
- Store technical designs in a central repository and log decisions in Jira
- Use change management process for any changes identified during design

## Joint Security Architecture Review

Deloitte continues to proactively perform Joint Security Architecture Reviews with the Consortium Security and Contractor Teams and other relevant stakeholders to perform security threat impact assessments, develop secure designs across CalSAWS enterprise systems, and identify cross-team impacts early. These reviews aim to:

- **Assess and Enhance Architectural Designs:** Work with solution architects and security leads to review application, network, and data designs that adhere to the latest



security standards and incorporate AWS design principles for Defense-in-Depth protection across layers and systems.

- **Facilitate Unified Security Strategy:** Collaborate with Consortium stakeholders on a cohesive security strategy that integrates across different systems and functions of the CalSAWS infrastructure to minimize security risk for the Consortium

## Develop & Deploy

Once the design is approved and tools are set up, we collaborate with the CalSAWS Contractor to provide ongoing support. This begins with a strategic planning session involving key stakeholders from both Contractors to document and share detailed project plans and specific role responsibilities. For upgrades, we also coordinate testing support with the CalSAWS Contractors, developing a comprehensive test plan that outlines strategies, methodologies, responsibilities, and schedules. This unified plan facilitates consistent testing practices across Contractors, enhances communication, and aids in resolving issues. Regular updates and reviews of the test plan accommodate any changes in project scope or timelines. We engage the DI Manager and CalSAWS Contractor key staff on the activities highlighted in Figure 4.1-11.

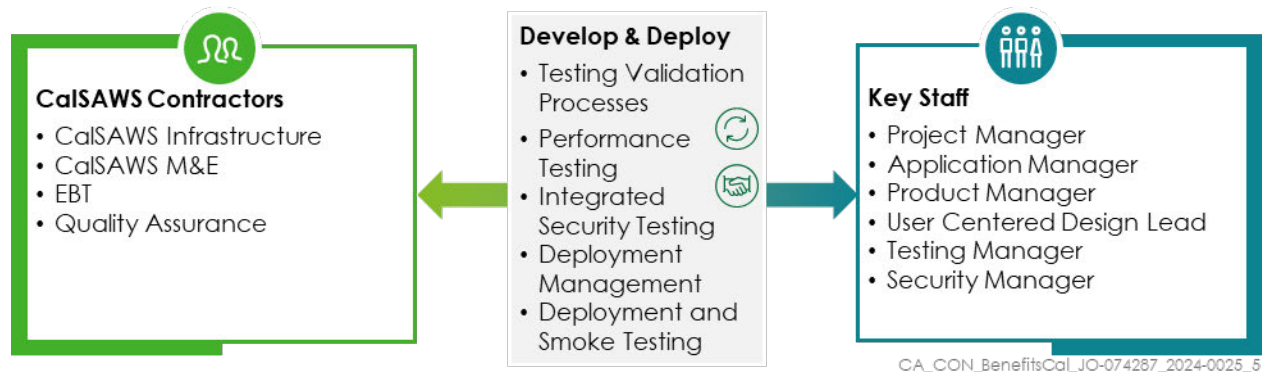


Figure 4.1-11. Shared Develop & Deploy Activities.

## Testing Validation Processes

Testing serves as the final defense to protect BenefitsCal and other systems from potential downstream impacts caused by SCR issues or production incident resolutions. Our test validation process verifies BenefitsCal and partner testing scripts. If an issue arises, we promptly collaborate with the impacted system(s) to resolve the code issue and proceed with re-testing. We also coordinate with interface partners to validate tests for changes made in the BenefitsCal application or by our partners, confirming the changes function as expected and conducting regression tests to confirm there are no unforeseen impacts on the CalSAWS system.

## Performance Testing

For BenefitsCal evolution, we employ an iterative performance testing approach that begins simultaneously with development. This helps identify performance issues early on and minimize the rework needed. We perform the following tasks to achieve this goal:

- Coordinate with CalSAWS Contractors to conduct isolated performance testing on new features immediately after development, assessing their scalability for expected production loads
- Coordinate with CalSAWS Contractors for integrated and incremental performance testing during system integration, verifying that new features and existing components do not adversely affect each other
- Collaborate with CalSAWS Contractors to address and retest identified performance deficiencies in BenefitsCal or related applications and processes during subsequent sprints
- Coordinate with CalSAWS Contractors to conduct "day-in-a-life" performance testing during hardening to simulate real-life scenarios and validate performance
- Conduct load test, stress test, endurance test, and spike test during hardening to validate system performance in varying conditions

### **Integrated Security Testing**

BenefitsCal incorporates robust security measures to minimize data loss and comply with regulatory standards. As we enhance its features to align with the Consortium's vision, our comprehensive security testing strategy includes application testing, code reviews, and integrated testing of supporting systems like ForgeRock and CalSAWS.

During the BenefitsCal implementation, Deloitte effectively collaborated with Consortium teams for integrated security testing and development. We are confident in continuing this collaboration with the CalSAWS Infrastructure Contractor. Deloitte maintains comprehensive end-to-end security testing with the Consortium and its Contractors throughout the BenefitsCal lifecycle, leveraging shared security technologies to identify risks consistently and coordinating the evaluation of contingency plans and procedures.

### **Deployment Management**

After development completion and sign-off on testing, the changes are ready to be deployed in Production.

A successful deployment requires a detailed plan that identifies dependencies on the moving parts of a release and provides details on areas such as operational readiness, interface partner readiness, sequence of deployment steps, and backup plans. We perform the tasks below to plan for a smooth release cutover:

- Conduct extensive release planning with the CalSAWS Contractor and other interface partners to identify dependencies and activities required for successful deployment
- Collaborate with Consortium stakeholders to confirm that required operational procedures are in place
- Communicate potential down times to affected system users and interface partners
- Share release notes with system users to inform them of the upcoming changes
- Cooperate with the Consortium and other CalSAWS Contractors to coordinate and execute technical Change Management activities for deploying CalSAWS changes



## Deployment and Smoke Testing

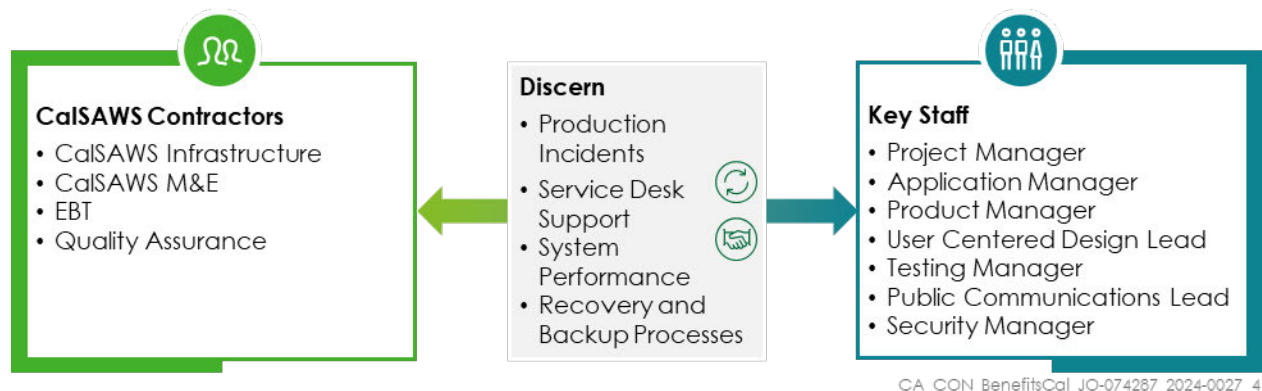
Deployment of the changes to Production is a detailed intensive activity that requires coordination across teams. We perform the following tasks for a smooth deployment:

- Host all-day open meetings for deployments to give stakeholders visibility into deployment activities and progress
- Conduct smoke testing with the CalSAWS Contractors' team after deployment
- Manage the code versioning in the production branch using the Bitbucket code management tool
- Jointly triage and resolve any issues found during smoke testing
- Share any steps needed by the users the next business day to avoid/mitigate the issue observed during deployment
- In cases requiring deployment rollback, collaborate with impacted Contractors to execute the rollback and conduct thorough smoke testing to validate the system

## Performing Supporting Services

Our team collaborates with other Contractors on the CalSAWS Project to offer support services, resolve issues, and maintain uninterrupted system performance, enhancing the BenefitsCal user experience. Our "one-team" approach requires daily monitoring and support across production operations and other areas to sustain continuous service within the BenefitsCal and CalSAWS ecosystem for Californians.

We work closely with CalSAWS Contractors to promote smooth operations and ongoing maintenance. We engage multiple CalSAWS Contractors to support the Discern phase (also known as Production) operations activities highlighted in Figure 4.1-12.



**Figure 4.1-12. Shared Discern/Production Operations Activities.**

## Production Incidents

Production issues often require close collaboration between BenefitsCal and the CalSAWS Contractors for effective triage. We perform the following activities:

- Lead daily issue triage meetings with the CalSAWS Contractors to identify the root causes of production issues and plan for required CalSAWS Contractors' fixes
- Use ServiceNow to collaborate with the BenefitsCal Service Desk team for timely resolution of CalSAWS Contractors' issues
- Document production outages with thorough impact analysis, immediate escalation, and real-time updates in a dedicated crisis management log for swift resolution and clear communication across Contractors; use Teams channels for production alerts across Contractors
- Execute M&O activities as outlined; coordinate testing, release planning, and deployments with CalSAWS Contractors, informing them of potential system impacts, including necessary outages

### DID YOU KNOW?



- Deloitte's incident resolution team provides efficient Tier 3 support.
- Incident tracking enabled by Jira.
- Deloitte's support and Consortium's help desk to document learnings.
- Support Technical Help desk in process development and implementation.

## Service Desk Support

When the Help Desk support team was established in 2022, Deloitte initiated an introductory kickoff call between the M&O and Help Desk teams, proposing bi-monthly meetings with the Tier 2 support team. This strategy aimed to enhance the BenefitsCal user experience, increase adoption and self-service, and decrease call volumes to Tier 2 and the County Help Desk, effectively reducing incident tickets for the BenefitsCal application.

In addition to the bi-monthly meetings, a continuous communication channel, referred to as the "collaborative handshake," was established on Teams between the teams and the Consortium. This channel supports the reporting of emergency outages and promotes ongoing and transparent communication. The bi-monthly collaborative meetings with Gainwell covers specific agenda topics:

- Educating Help Desk staff on ongoing functionality and user experience changes being released with the BenefitsCal system implementations
- Understanding the BenefitsCal call volume percentages and customer challenges across various categories (e.g., application, renewal and SAR workflows, document upload, case-linking, and account management workflows)
- Reviewing frequently occurring incidents, resolutions, and alternate procedures





**Figure 4.1-13. Collaborative Handshake.**

This collaborative handshake, illustrated above in Figure 4.1-13, between the two teams has resulted in more than 15 user experience issues for improvements. Enhancements addressed for customers include updating copy text on the password reset workflow for improved workflow clarity; updating the security answer feature to allow spaces; allowing users to update a phone number on BenefitsCal using their account settings; improving self-service access or updating the CX on the site during the security response period informing the clients of the case linking unavailability; and MFA mandates based on the weekly call volume. The ongoing partnership has also resulted in quicker Tier 2 issue resolution using the many alternate procedures provided while the system was being enhanced on the back-end. Additionally, updates have been made to the FACT sheet, FAQ, and YouTube channel for user review. Starting in 2023, as the system developed, over 85 percent of the BenefitsCal-triaged tickets were rerouted to Tier 2 with a “how-to” step included. Our team retained fewer than 15% of these tickets on average. We have begun collaborating with the Help Desk team to modify the default routing for certain ticket categories. This change aims to prevent the back-and-forth of tickets, known as “ping pong,” and to expedite ticket resolution for users. Looking ahead, we propose increasing the frequency of our meetings to further enhance the Help Desk team's understanding of the system's functionality, improving service to our customers. Additionally, we plan to use AI-driven tools to analyze Tier 2 call volumes. This data mining will help us understand the volume and categories of calls, enabling us to make data-driven improvements that continuously enhance the customer experience (CX).

### System Performance Monitoring

System performance is checked daily using health checks. We work alongside the Consortium and other CalSAWS Contractors to align with the activities consistent in the BenefitsCal Service Plan and the associated OWDs. If a performance issue arises, we work with other Contractors who may be required to help identify root cause, resolution, test fix and notification on the BenefitsCal site and to stakeholders if there is a disruption to service during performance issue.

As BenefitsCal expands, it is crucial to proactively manage the capacity of its system components for optimal usage. With over four million users and multiple interface partners, a robust performance management plan is essential to meet system and operational needs. We undertake the following tasks to review and update our capacity and performance management plans:

- We work with other contractors to conduct capacity forecasts and confirm that CalSAWS Contractors' application design requirements are met during scope refinement sessions
- We identify gaps in the performance testing suite compared to our "day in a life" scenarios, focusing on comprehensive assessments of real-world performance unlike most contractors who test individual components or limited integrated systems
- We identify support required from other contractor teams for performance testing and plan execution during joint design review sessions
- We prepare and facilitate the mandatory BenefitsCal Monthly Performance Meeting, including a detailed review of the SLA Performance Report

### **Security Monitoring**

As the security threat landscape continues to evolve, proactively monitoring new security trends and attack vectors is critical. Proactively sharing threat intelligence information to take timely actions is key to safeguarding against new security threats.

Deloitte has demonstrated proactive threat intelligence sharing with Consortium Security and Contractor teams. This includes sharing national trends surrounding patterns in fraud (e.g., email dotting) and analysis of dark web scanning as a reflection of our commitment to support the Consortium beyond our required obligations.

Deloitte continues to foster the culture of proactive threat intelligence sharing with Consortium and its Contractors through engagement with security team leads to analyze potential threats and provide insights, strengthening our collective defenses.

### **Technology Recovery**

If the primary production deployment becomes unavailable, our team provides coordination and support with the CalSAWS Infrastructure Contractor, the Cloud Services Provider, and other CalSAWS Contractors necessary to re-establish BenefitsCal production. We:

1. Immediately notify relevant Contractors about the incident and establish clear lines of communication among Contractors
2. Collaborate with Contractors to identify the root cause of the production outage and determine the extent of the impact on users
3. Restore and/or validate BenefitsCal application components
4. Coordinate with and assist other CalSAWS Contractors in restoring CalSAWS services with needed technical resources and verify sufficient personnel are available for restoration
5. Collaborate with and conduct comprehensive testing to confirm the system is fully function post-restoration
6. Document and create detailed reports and actions taken for future references



To continue to minimize system unavailability, our team performs a BenefitsCal Recovery Test semi-annually based on a test plan approved by the Consortium and reflective of the Technology Recovery Plan in conjunction with the Consortium, Cloud Services Provider and other CalSAWS Contractors as applicable.

### **Backup and Restoration**

Our team has established backup and restoration plans, coordinating with the Consortium and other CalSAWS Contractors. We will review and potentially modify the BenefitsCal Service Plan and associated OWDs as needed. Additionally, we manage the configuration and execution of backup and restoration activities.

### **Proactive and Holistic Security Incident Support**

Deloitte collaborates with Consortium Security and the Contractor team to efficiently triage and address potential security incidents. We continuously improve our threat and incident management processes to swiftly counteract adversary Tactics, Techniques, and Procedures (TTPs), enhancing proactive response capabilities. This confirms comprehensive containment, eradication, and remediation of threats within the CalSAWS environment.

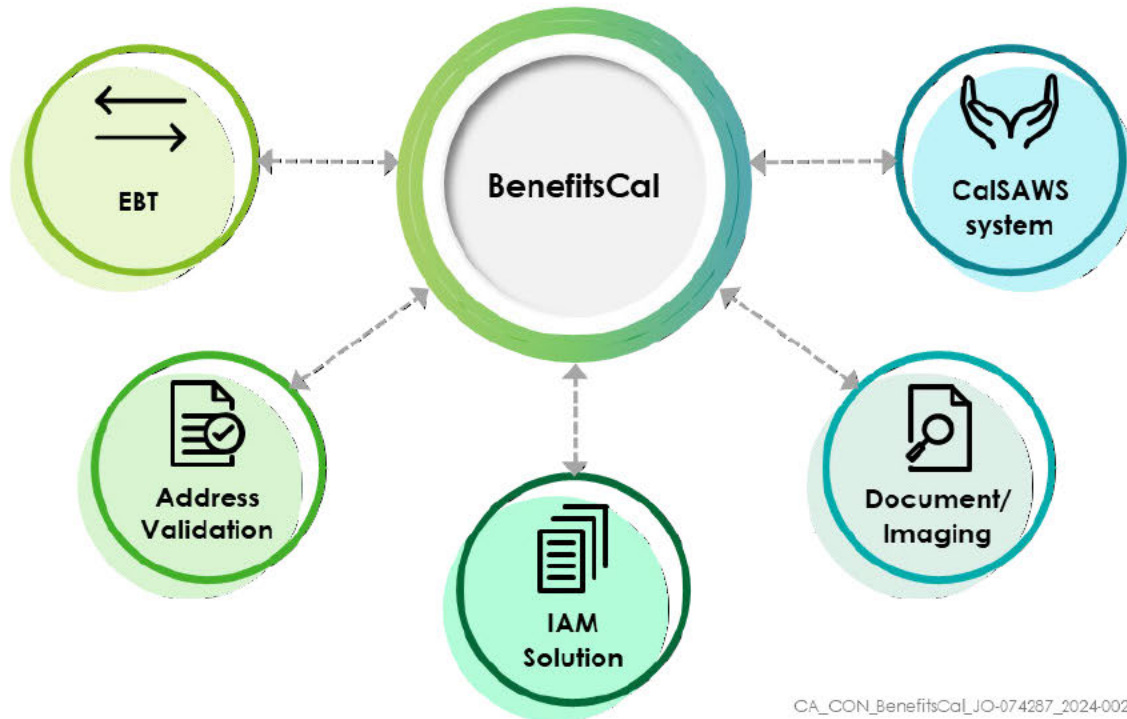
Deloitte adheres to established policies and procedures for detecting, analyzing, containing, reporting, and recovering from security and privacy incidents, confirming swift, thorough responses in collaboration with relevant parties. This includes correlating security events across CalSAWS systems to identify and implement appropriate mitigation steps, while informing impacted parties.

### **Security Reporting**

We maintain transparency with the Consortium through regular updates and detailed reviews of security measures, vulnerability findings, and compliance status. Ad hoc reports are developed and shared to brief relevant stakeholders on identified risks or incidents. For instance, our security team recently investigated and reported on malicious activities targeting the creation of counterfeit BenefitsCal websites. Based on these findings, we are exploring potential brand reputation services with the Consortium to provide automated defenses against such threats.

## Coordination with Interface Partners

In a multi-contractor environment, collaboration is crucial for managing interfaces. We work closely with our interface partners, as detailed in Figure 4.1-14 and Table 4.1-8.



**Figure 4.1-14. Collaboration with Interface Partners.**

Activities	Collaboration with Interface Partners
<b>API Framework Design</b>	We collaborate with interface partners and CalSAWS Contractors to develop robust APIs, addressing security, traffic management, discovery, documentation, caching, monitoring, and auditing.
<b>Environment Coordination</b>	We hold regular meetings with CalSAWS Contractors and Interface partners to identify testing environments and endpoints, and coordinate code versions and test data across systems.
<b>Interface Testing</b>	We facilitate early interface testing planning and begin testing during development using mock services. We share mock API requests and responses for early validation and coordinate with CalSAWS Contractors. If a defect is identified in a non-production environment causing an API failure, our team collaborates with the interface partner to diagnose, resolve, and verify the resolution through partner interface testing.
<b>Monitoring and Issue Resolution</b>	We coordinate with CalSAWS Contractors to monitor interface health, tracking transaction volumes, exceptions, errors, and event logs, as well as success and error reports through our batch monitoring team. If an issue arises, we actively collaborate with interface partners to triage and resolve it.

**Table 4.1-8. Collaboration with Interface Partners.**



## 4.2 Software Development

### 5.2.3.2 Understanding and Approach to Software Development

Experiences and expectations change and change frequently in the world in which we live. In the last year we have seen more security incidents than ever before as bad actors evolve their approaches to access personal information for which they are not authorized. Customers and Community Based Organizations' (CBOs) behaviors have changed since we implemented BenefitsCal during the middle of a pandemic asking for more transparency around where their requests for services are in the process. One thing has not changed. People expect swift response to their needs, including the counties that are frontline assisting Customers and CBOs, with information that is helpful, accurate and timely for individuals to make critical decisions impacting the most vulnerable Californians. They also expect that it is done in a way that is empathetic and tailored to their circumstances. It is with this lens that we look to the future of advancing efforts that we jointly instituted to protect sensitive Customer information and envision, accelerate and measure the impact of public facing changes to Customers, Counties and CBOs by building upon the current foundation of BenefitsCal.

Since its inception in 2020, the BenefitsCal team has actively engaged with Customers, County workers, and CBOs through interviews, focus groups, and usability testing. This engagement is part of our monthly design cycles and has been crucial in evolving our User-Centered Design (UCD) approach that integrates what we hear from individuals with what we actually see in terms of how they interact with and use BenefitsCal. This ongoing evolution has led to increased stakeholder engagement and progressively enhanced experiences for Californians.

#### SECTION HIGHLIGHTS



- Elevating the BenefitsCal user experience by engaging users iteratively throughout User-Centered Design
- Increased stakeholder engagement through a "one team" approach across Deloitte, the Consortium, Counties, State Partners, and other stakeholders, promoting business value, consensus, and transparency
- A more secure, stable, and compliant BenefitsCal through proactive integration of security throughout each phase
- Incremental delivery of BenefitsCal changes, at consistently high quality, to provide early access to valued features



*Blake Weyland*  
**UCD Lead**

Since the beginning, Blake and the UCD Deloitte Team has engaged stakeholders to voice their needs and the barriers they face in design and development discussions at each stage of the SDLC. This tailored UCD approach helps us make data-driven user-focused design decisions, while continuously engaging with other stakeholders (policy, security) to gain diverse perspectives and make sure our designs were desirable, viable and feasible.

“Listening to real customers leads to really happy customers

#### Customer Feedback

“Yeah, that should be up top, the first thing you should see is your EBT balance and then it would be cool if i had the option to block the card or reset my pin.”

Kian, June 19, 2024

★ **Bring Additional EBT Card Management Features to BenefitsCal**

#### Customer Feedback

“I like being notified that something's happening because I live in condensed housing. We have our mailboxes which are in a group. It's not unusual for mailman to stick someone else's mail in your box. If you're expecting a card, something somebody can steal from you, it's nice to know it's on the way.”

Sondra, July 2, 2024




★ **Add More Notifications Through BenefitsCal**







Looking ahead, we are committed to further refining our UCD approach, building upon the Consortium's vision of UCD and development. This effort involves deep collaboration across Counties and vendors, building on our foundation to drive measurable outcomes and empower data-driven decisions. Together, we are set to continue making impactful enhancements that meet the dynamic needs of all stakeholders involved.

### Considerations for Advancing BenefitsCal's Success

Reflecting on the last four years, while there is much to celebrate there is also work to be done to allow BenefitsCal to realize its full potential: to transform engagement and service delivery by allowing individuals to self-serve with trust that their information is protected. This would create less foot traffic in the county offices and less calls to the contact centers. Welfare and Institutions Code WIC § 10823.3 set out the objective to minimize "...the burden of the overall eligibility process for enrollment and retention of benefits for low-income Californians and streamlining interactions for both clients and eligibility workers." With the foundation of BenefitsCal, some of that burden has been lifted with additional opportunities to reduce it even further. We have heard loud and clear through our research and input from the Collaboration Model about opportunities to extend services through BenefitsCal as well as enhance the overall experience. Table 4.2-1 below compiles some of the success factors and the impacts of our proposed enhanced approach.

Success Factors	Impact of Our Enhanced Software Development Approach
 <b>Increased Transparency through Strategic Collaboration</b>	We collaborate closely with the Consortium, Counties, Advocates, State Partners, CWDA, labor unions, CalSAWS Contractors and Customers to enhance engagement and confirm they are well-informed. Opportunities for iterative incorporation of stakeholder feedback are created throughout our User-Centered Design life cycle. This approach fosters a more inclusive and effective design process.
 <b>Inclusive Access for all Californians</b>	We enhance user group segmentation by actively incorporating a broader ethnographic approach, confirming that we effectively target and include historically underrepresented segments. This strategy will allow us to gain deeper insights and foster inclusivity across all user demographics. By doing so, we are committed to delivering solutions that are not only comprehensive but also culturally and contextually relevant.
 <b>Increased Efficiency in UCD process using Gen-AI Accelerators</b>	<div data-bbox="540 1518 1380 1816" style="background-color: black; width: 100%; height: 142px; position: relative;"> <div style="position: absolute; bottom: 0; right: 0; width: 100%; height: 100%; background: linear-gradient(to top right, transparent 49%, black 49%, black 51%, transparent 51%); background-size: 20px 20px;"></div> </div> <p>This integration of AI facilitates a deeper and faster understanding of customer behaviors and needs, allowing us to rapidly develop</p>



Success Factors	Impact of Our Enhanced Software Development Approach
	<p>insights and implement effective product improvements and initiatives.</p> <p>Changes in the system are not just changes from functional or feature perspective but there are also changes in relation to changes to external systems or changes for technical and architectural aspects of the ecosystem.</p> <div data-bbox="537 415 1422 877" style="background-color: black; width: 100%; height: 200px;"></div>
 <b>Measure Customer Experience (CX) with Data-Backed Decision Making</b>	<p>We outline a strategy to define and evaluate Objective and Key Results (OKRs), including user satisfaction, system errors, and time on task, to enhance the UCD approach. Building tailored dashboards allow for efficient evaluation of analytics data, facilitating continuous improvement. This approach provides actionable insights, driving enhancements in system performance and user experience.</p>
 <b>Strategic User-Centric Enhancements</b>	<p>Our approach prioritizes system changes based on business value and user impact, aligning with the CalSAWS Release When Ready (RWR) methodology. This strategy confirms incremental system changes, offering greater flexibility and responsiveness to evolving business needs. By focusing on these principles, we deliver enhancements that are both strategic and user-centric, maximizing overall system effectiveness.</p>
 <b>Expanding Trust in the Usage of BenefitsCal</b>	<p>We confirm that application is secure by design, effectively balancing robust security measures with an optimal user experience. Preempting vulnerabilities, we facilitate early remediation, enhancing the resilience of our solutions. Increasing automation streamlines security operations, making them more efficient and responsive to emerging threats.</p>
 <b>Joint Discovery and Solutioning with CalSAWS Contractors</b>	<p>Historically CalSAWS and BenefitsCal have performed independent yet integrated efforts to define and design solutions that span CalSAWS Core, BenefitsCal, ForgeRock or Imaging. Moving forward, our team works jointly with CalSAWS M&amp;E and CalSAWS Infrastructure to perform joint research, discovery and design to achieve a more holistic design and experience for Benefits Cal and CalSAWS users.</p>

**Table 4.2-1. Success Factors for Improving our UCD Approach, User Experience and Strengthening Application Security.**

## 4.2.1 Improving the BenefitsCal UCD Approach and Customer Experience

UA3

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

Understanding the diverse needs of Californians is paramount in connecting them to essential services. As we advance our collaboration, we use User-Centered Design (UCD) as a foundational framework that focuses on these varied needs throughout our service delivery process. Building on our established efforts, we are deepening our commitment to drive humanity, trust, equity and genuine empathy. By sharpening our focus on these principles, we aim to enhance the quality and accessibility of the services we provide.

We developed BenefitsCal through a four-phase UCD process, which included Discover, Define, Build, and Deliver phases. This method featured deep understanding of user needs and iterative collaboration with stakeholders, which not only provided valuable insights but also aligned enhancements with stakeholder needs during the implementation of BenefitsCal. Now in its third year, BenefitsCal is maturing as an application. We plan to refine our UCD process by incorporating lessons learned from the current UCD approach on BenefitsCal and CalSAWS, other California projects and agencies such as CalHEERS, CDPH, CARES, and DHCS, as well as from our national experiences.

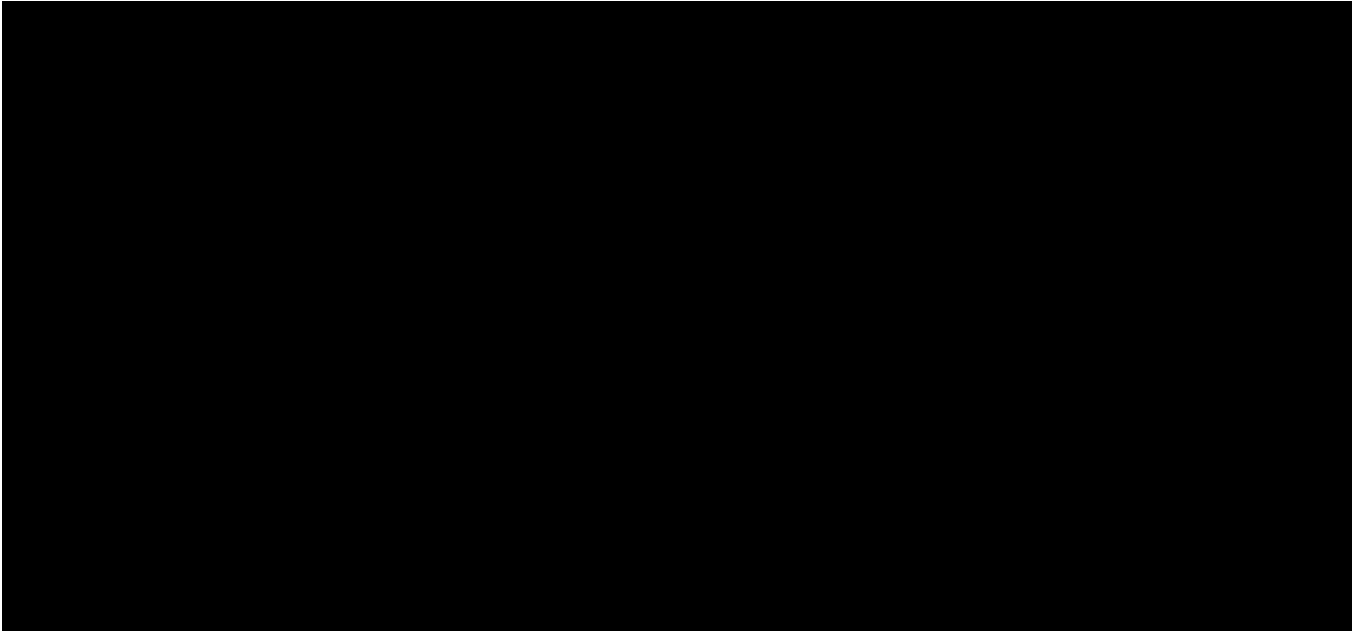
We know that the human experience is anything but generic. It's nuanced, textured, and diverse. Thus, throughout our revised five-phase UCD approach we focus on humanity, trust, equity and genuine empathy. **Humanity** is centering on the lived experiences of individuals understanding their story and solutioning with empathy, understanding and respecting the history that came before. **Trust** is understanding the factors that shape our opinion: humanity, transparency, capability, and reliability. **Equity** is building solutions across the varied user needs balancing them as equal, throughout the ecosystem, and designing with co-creators at the table. **Genuine Empathy** is operating with humility, acknowledging your lens and mitigating the impact of your bias. As we continue to learn with and from those around us, the purpose remains constant: to champion an approach in which traditionally marginalized voices are equally balanced in the conversation to drive more inclusive and equitable evaluation of problems and solutions.

### DISTINGUISHING FACTORS



- [REDACTED]
- [REDACTED]
- [REDACTED]

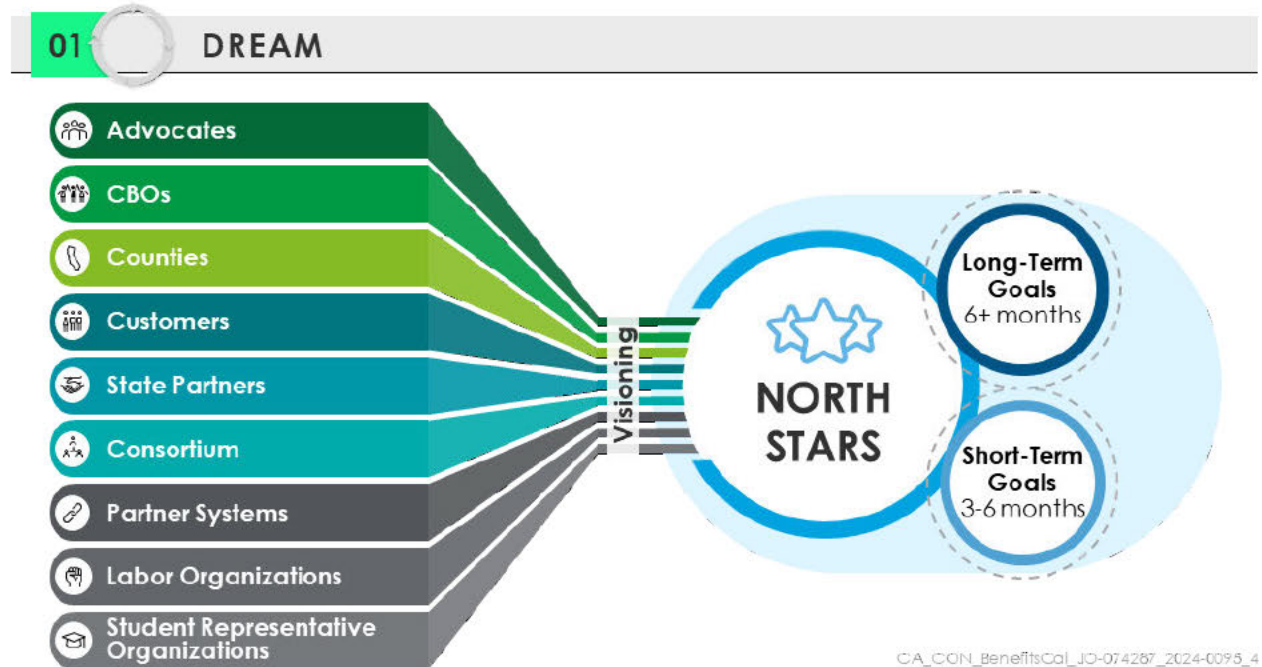




First, the revised process introduces a new Dream phase to craft a shared vision with BenefitsCal stakeholders. We combined the Discover and Define phases into a single phase that concentrates on understanding customer, CBO and county needs, defining core problems, and identifying key metrics (e.g., # of Customers who called the Contact Center or went into an office after submitting an application through BenefitsCal and for what purpose). This is followed by a Design and Deliver phase, where we create, test, and refine designs. Next, the Develop and Deploy phase brings the solution to life. Finally, the new Discern phase focuses on collecting and evaluating metrics to assess the impact of the enhancements and guide future Dream phases. Historically measurement has largely been focused on information that is produced primarily from BenefitsCal and some from the CalSAWS enterprise IdAM solution around account management. This has limited the view of the impacts, both positive and negative that BenefitsCal has on broader outcomes. Shifting to an environment where the collective whole is evaluated looking from a programmatic and operational lens will provide the CalSAWS stakeholder community with more transparency around areas for growth and areas of strength.

## 01 Dream

The Dream phase, shown below in Figure 4.2-2, empowers stakeholders to establish strategic goals and north stars for BenefitsCal. North stars are guiding principles to homogenize decision-making across stakeholders. The team currently operates with a UCD mindset, and this mindset is enhanced by the addition of several new practices in the next contract. This phase sets the Consortium's vision and north stars for the product through collaborative sessions focused on Californian needs and stakeholder goals.



**Figure 4.2-2. Dream—Ideate and Establish Goals Based on North Stars.**

### Why the Dream Phase Matters:

The Dream phase is an essential addition, as it helps confirm a place at the table for the voices of all stakeholders, including the Consortium, labor organizations, student representative organizations, Customers, Counties, advocates, CBOs, and State partners. Iterative inputs are gathered from real users, stakeholders, and County workers, and these inputs are synthesized into actionable and measurable outcomes, keeping all parties involved and aligned on north stars to guide user-centric product decision-making.

Tables 4.2-2 and 4.2-3 below summarize the current BenefitsCal process and the proposed future enhancements for this phase of UCD.

Current Processes		
Method	Description	Benefit
<b>Collaboration model</b>	Facilitates stakeholder meetings to integrate policy, technology, and customer insights	<ul style="list-style-type: none"> <li>Confirms all stakeholders have a voice in the ideation process for BenefitsCal priorities and enhancements</li> </ul>
<b>Opportunity roster</b>	A catalog of enhancement submissions	<ul style="list-style-type: none"> <li>Creates a backlog of all enhancement ideas to be prioritized</li> </ul>
<b>Post-Production Analytics</b>	Monitoring through Amplitude measurement, Always on Survey, Intercept Surveys, among other methods	<ul style="list-style-type: none"> <li>Provides qualitative and quantitative data points to shape the customer journey</li> </ul>

**Table 4.2-2. Dream—Current Processes.**



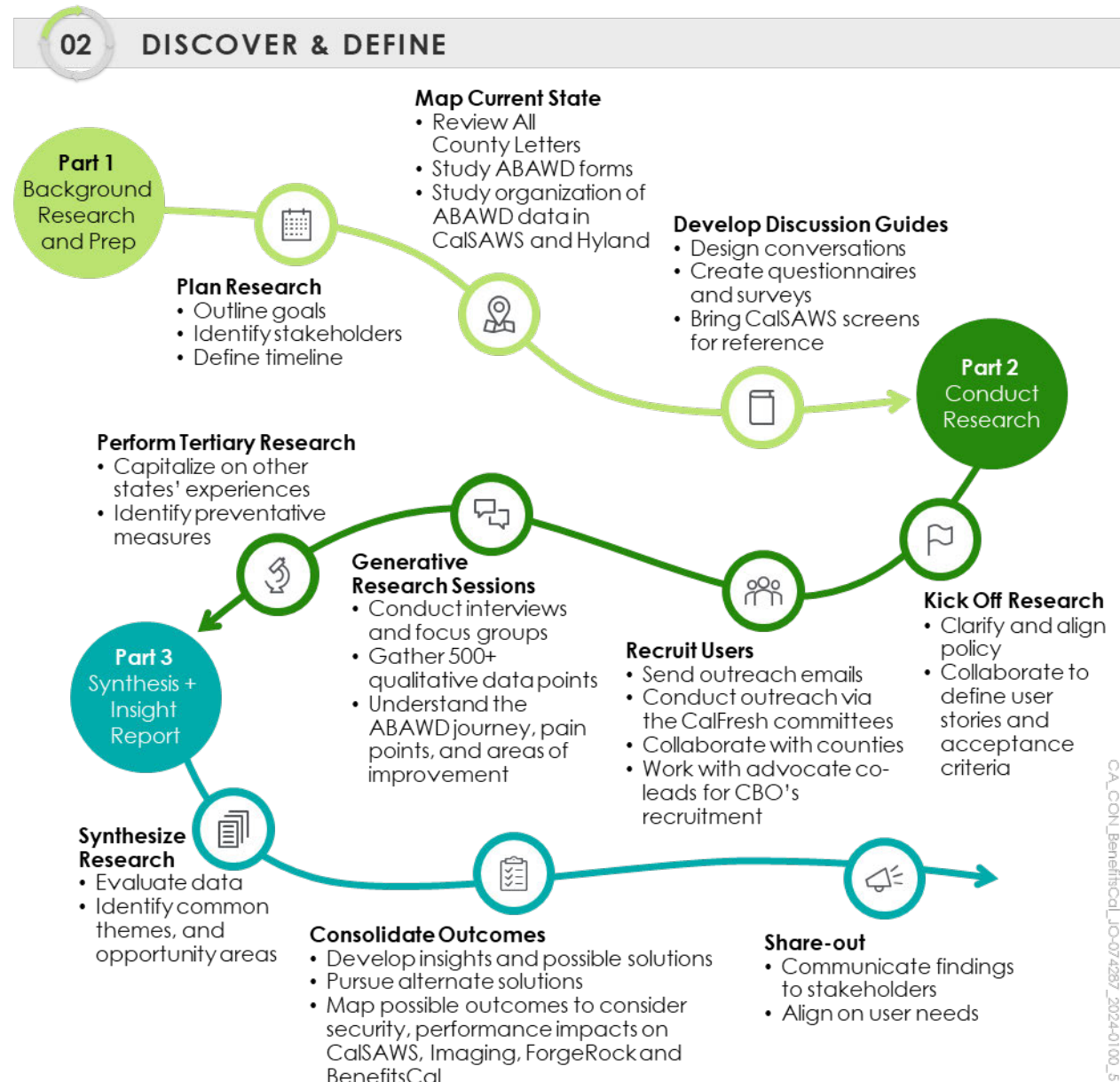
Future Enhancements		
Method	Description	Benefit
<b>Reinforce the North Star vision</b>	Guiding statement that encompasses the customer-centered business vision	<ul style="list-style-type: none"> <li>• Maintains alignment to the overall mission of BenefitsCal, decreasing cycle time to come to definitive aggregate decisions</li> </ul>
<b>Collective Enhancement Prioritization</b>	Set of tenets that make it easy to evaluate different enhancement submissions from the Collaboration Model and Opportunity Roster	<ul style="list-style-type: none"> <li>• Provides clarity in the voting process.</li> <li>• Confirms that all stakeholders collaboratively prioritize a holistic view of the project backlog</li> </ul>
<b>Objectives and Key Results (OKRs)</b>	A method to set and measure outcomes, to align with the north stars and shared goals that span the CalSAWS enterprise inclusive of the CalSAWS M&E and CalSAWS Infrastructure Contractors	<ul style="list-style-type: none"> <li>• Allows stakeholders to accurately gauge the effectiveness of enhancements</li> </ul>
<b>Enhance Ethnographic Research</b>	Research that involves observing and interviewing customers in the context of their own environments, such as shadowing activities	<ul style="list-style-type: none"> <li>• Enhances user adoption among targeted ethnographic groups</li> </ul>

**Table 4.2-3. Dream—Future Enhancements.**

## 02 Discover and Define

In Discover our team conducts qualitative and quantitative research to understand and document the needs of BenefitsCal customers. Our goal is to build on our existing knowledge of BenefitsCal customers, their needs, expectations, and pain points using UCD tools and techniques. We create current-state journey maps to identify and document pain points, moments that matter in the customer experience, and opportunities for improvement. These current-state journey maps are reviewed by stakeholders, and feedback is used to construct future-state journey maps.

Figure 4.2-3 below shows a high-level overview of our Discovery approach for recently concluded ABAWD research activities.



**Figure 4.2-3. Discovery Approach for ABAWD Research.**

In the Define phase, we move from researching and gathering insights to focusing on the most important issues. We narrow down our findings to identify and prioritize the root causes of the problems. We identify specific focus areas and distill the information we have gathered into a clear and actionable problem statement to guide the Design and Deliver phase.

### Why the Discover and Define Phase Matters

The Discover phase is critical as it involves actively understanding user needs through various methods such as surveys, interviews, analytics, shadowing, and regular interactions with stakeholders. These activities drive actionable insights that are crucial for the next step. In the Define phase, we use these insights to clarify and prioritize



outcomes. This approach helps focus our design and development efforts on user-centered solutions that aim to meet the needs identified in the Discover phase. Tables 4.2-4 and 4.2-5 below summarize the current BenefitsCal process and the proposed future enhancements for this phase of UCD.

Current Processes		
Method	Description	Benefit
<b>Customer Recruitment</b>	Strategies for recruiting customers for research	<ul style="list-style-type: none"> <li>Brings in perspective from real end users</li> </ul>
<b>Data and Research Synthesis</b>	Aligns data points to confirm feature enhancement direction	<ul style="list-style-type: none"> <li>Identifies the right problems to solve through synthesis and reframing</li> </ul>
<b>1-on-1 customer Interviews</b>	Engage customers in an in-depth conversation about their benefits journey	<ul style="list-style-type: none"> <li>Identifies unique customer needs, expectations, pain points, and interaction points. Reduces operational costs and improves efficiency</li> </ul>
<b>Focus Groups</b>	Engage a set of customers in a collaborative conversation about their benefits journey	<ul style="list-style-type: none"> <li>Captures insights from multiple customers at once and is cost-effective</li> </ul>
<b>Modes and Mindsets</b>	Post-research synthesis activity that allows us to categorize and analyze distinct behavioral patterns and customer types observed through customer research	<ul style="list-style-type: none"> <li>Guides a role- and process-based understanding of user behavior, and one that is ethnographic group-agnostic</li> </ul>
<b>User Journey Map</b>	Customer-oriented visualization of the process's customers go through when attempting to accomplish a goal	<ul style="list-style-type: none"> <li>Guides feature prioritization based on understanding your customers' benefits journey</li> </ul>

**Table 4.2-4. Discover and Define—Current Processes.**

Future Enhancements		
Method	Description	Benefit
<b>Enhanced Customer Recruitment</b>	Improve existing practices to conduct targeted outreach for specific customer populations who experience BenefitsCal differently	<ul style="list-style-type: none"> <li>Enhances our perspective from real end users and balances the voice of specific customer groups. For e.g., generational families, senior citizens, people experiencing homelessness, and students</li> </ul>
<b>County Journey Maps</b>	Outline workflows for various County staff and their interaction points with BenefitsCal customers	<ul style="list-style-type: none"> <li>Help align changes to County processes. Enable Counties to better serve their customers</li> </ul>
<b>Alignment on Objectives and Key Results</b>	Analyze OKRs as defined in the Dream phase through the lens of the CalSAWS enterprise with end-to-end views of data	<ul style="list-style-type: none"> <li>Validates research output aligns with the OKRs identified for the feature</li> </ul>

Future Enhancements		
<b>Enhanced Policy Research</b>	Use Deloitte countrywide HHS policy expertise and AI summarization for understanding new policies and their impacts more efficiently	<ul style="list-style-type: none"> <li>Improves speed of delivery and the ability to bring solutions and approaches from other states</li> </ul>
<b>Analytics Tools</b>	Use AI-powered tools to process larger amounts of qualitative and quantitative data	<ul style="list-style-type: none"> <li>Provides quicker insights to user experience patterns and improves decision-making with better data</li> </ul>
<b>Enhanced Survey Techniques</b>	Increase capture points and connections to CalSAWS user data	<ul style="list-style-type: none"> <li>Improves user segmentation, enabling a more accurate understanding of the customer's journey through BenefitsCal</li> </ul>

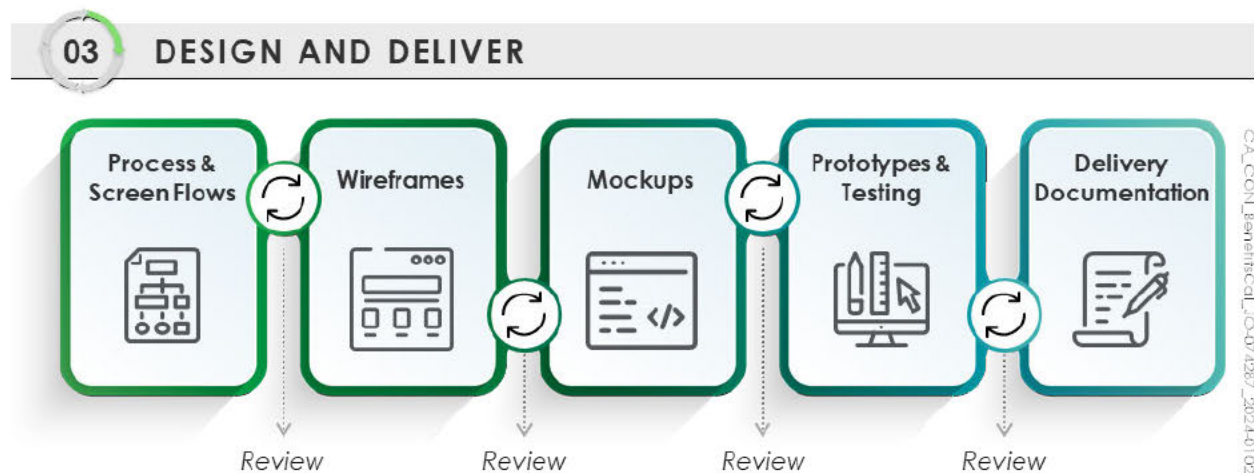
**Table 4.2-5. Discover and Define—Future Enhancements.**

### 03 Design and Deliver

In our enhanced UCD process, the Design and Deliver phases are critical for translating user insights into actionable outcomes and verifying these align with strategic objectives. These phases build upon the foundational work completed in the Discover and Define phase, moving from concept to reality with a focus on efficiency, intuitiveness, and adherence to established mobile-first design principles.

In the Design phase, we capitalize on the insights and requirements identified earlier, transforming them into designs and prototypes, as shown below in Figure 4.2-4. These prototypes are tested with end users and Counties to mitigate risks and enhance value.

In the Deliver phase, the focus shifts to documentation and verification of all essential components, confirming that BenefitsCal offers a consistent user experience. This phase confirms that the project aligns with the design principles from the Dream phase and meets industry best practices for consistency, accessibility, and an on-brand visual design aesthetic. Reinforcing the project's alignment with strategic goals, County processes, and user expectations.



**Figure 4.2-4. Design & Deliver – Iterative Review Process.**



## Why the Design and Deliver Phase Matters

The Design phase involves refining designs through feedback from users and stakeholders. This process results in detailed, efficient prototypes that meet the needs of the end users. The Deliver phase verifies that the documentation for detailed, fully developed prototypes and guidelines is complete. It includes comprehensive specifications that have been thoroughly tested for user friendliness. This step confirms consistent delivery throughout the SDLC process.

Tables 4.2-6 and 4.2-7 below summarize the current BenefitsCal process and the proposed future enhancements for this phase of UCD.

Current Processes		
Method	Description	Benefit
Screen Flows	Maps out the sequence of screens that users navigate through within an application, detailing the interactions and transitions between these screens	<ul style="list-style-type: none"> <li>Improves our understanding of users' journeys and their functional technology needs</li> </ul>
Wireframes	Low visual fidelity iteration to build out content and functionality designs	<ul style="list-style-type: none"> <li>Faster design iterations using a base skeleton of content for visual understanding</li> </ul>
Co-design Sessions	Sessions with stakeholders, fostering collaborative design-related decision-making	<ul style="list-style-type: none"> <li>Builds buy-in with the stakeholder community on changes and adds their extensive knowledge of customers' rights in the final design</li> </ul>
Prototypes/User Testing	An interactive representation with clickable screens for specific scenarios that mirror typical tasks users might perform	<ul style="list-style-type: none"> <li>Help us determine if proposed designs meet customers' needs and bring clarity to potential improvements</li> </ul>
Security Design Review	Assess screen flows, wireframes, and prototypes from a security lens	<ul style="list-style-type: none"> <li>Better detection of potential security risks proactively associated with the proposed design while balancing user experience needs</li> </ul>
Design Review Meetings	Monthly UCD Meeting and Self-Service Portal committee	<ul style="list-style-type: none"> <li>Improve transparency and insight into near-final designs and user testing outcomes with stakeholders</li> </ul>

**Table 4.2-6. Design and Deliver—Current Processes.**

Future Enhancements		
Method	Description	Benefit
<b>Refine UI Style System with an Atomic Design Framework</b>	Methodology composed of five distinct stages (atom, molecule, organism, templates, pages) used to create a deliberate and hierarchical UI design	<ul style="list-style-type: none"> <li>Decreases number of decision cycles</li> <li>Increases efficiency, and accuracy</li> <li>Scalable, modular, and repeatable</li> </ul>
<b>Enhanced Design Principles</b>	Rules to solve specific design challenges, related to implementation and usage of specific UI elements and user flows	<ul style="list-style-type: none"> <li>Decreases design/decision time by enhancing a modular design pattern approach</li> <li>Increases consistency across application</li> </ul>
<b>Proactive and Iterative stakeholder inclusion in the Design process</b>	Objective driven collaborative design sessions engaging stakeholders early and often to increase alignment throughout the design process (e.g., journey maps, functional process flows, wireframes, mock-ups and prototypes)	<ul style="list-style-type: none"> <li>Confirms User and stakeholder alignment of need and solution across UCD design life cycle</li> <li>Decreases number of cycles and effort of review or change</li> <li>Closes gaps based on stakeholder-specific knowledge early in the process</li> </ul>
<b>Joint Design of OKR Collection and Reporting</b>	Working with stakeholders and our CalSAWS M&E and CalSAWS Infrastructure Contract partners, jointly define and design how OKRs will be calculated, captured and how they will be represented.	<ul style="list-style-type: none"> <li>Provides a holistic view of outcomes from an operational and programmatic lens versus a siloed view from BenefitsCal alone</li> </ul>

**Table 4.2-7. Design and Deliver—Future Enhancements.**

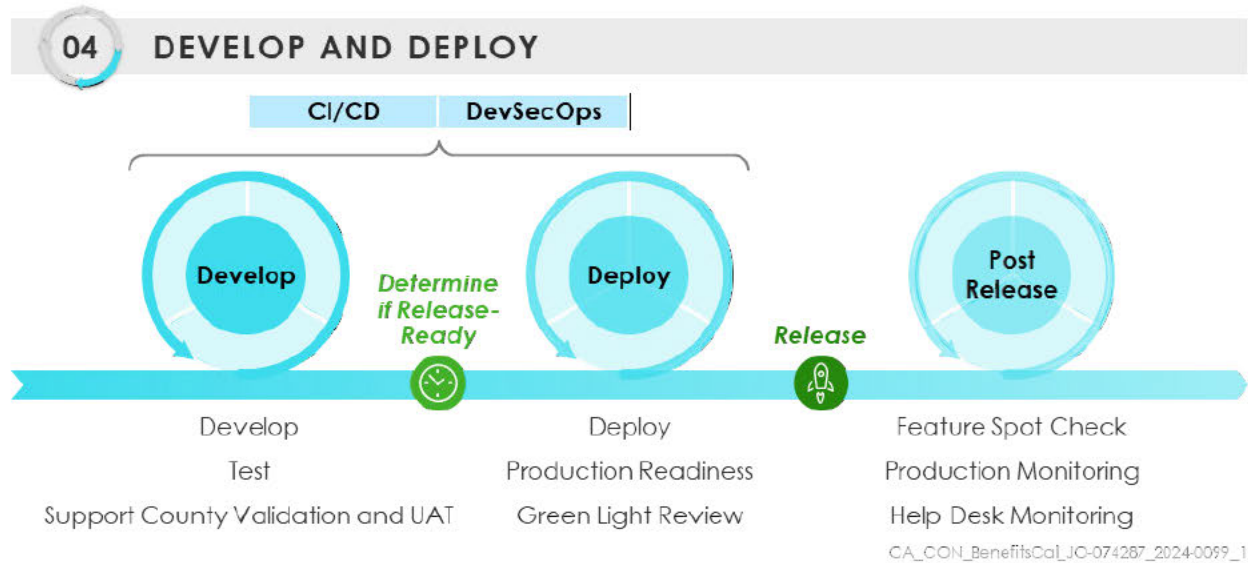
#### 04 Develop and Deploy

We work with the Consortium to prioritize items in consideration to optimize the value of slotted changes scheduled for a release. Prioritization includes representations from key stakeholders like Customers, Consortium, Counties, state policy and other external stakeholders through Collaboration Model. We understand the complexity and importance of this in the SDLC process, the business, and tools to build that alignment. Once prioritized, the requested change is put on the roadmap before taking it through the SDLC. Our approach uses UCD techniques to create a common goal for all groups. Our understanding of your business and the cyber environment allows us to develop a tailored approach to integrate security, privacy, and risk management controls and



activities, and cyber accelerators and/or threat intelligence into the SDLC as well as operations.

Figure 4.2-5 below shows our Develop and Deploy phase and various sources for system changes seeding into this phase making the full SDLC.



**Figure 4.2-5. Develop and Deploy Process.**

### Why the Develop and Deploy Phase Matters

Today, SCRs are identified from various sources such as policy changes, outputs from customer experience measurement, production monitoring processes, the collaboration model, and required technical upgrades. A refined UCD and security perspective are central to developing and deploying the SCRs. Collaboratively applying UCD throughout these phases enables us to develop a high-quality BenefitsCal system that effectively meets stakeholder needs. Metrics to understand the impact of changes as well as ongoing usage of existing BenefitsCal features on broader outcomes (e.g., call volumes, office visits, benefits churn or appeal requests) necessitates end to end monitoring of OKRs across the CalSAWS enterprise in order to provide a complete picture.

Tables 4.2-8 and 4.2-9 summarize the current BenefitsCal process and proposed enhancements for this phase of UCD.

Current Processes		
Method	Description	Benefit
<b>Develop and Build</b>	<p>Reusable frameworks, repeatable processes, configurable solutions, and built-in accelerators for language translations</p> <p>Unit testing, peer code reviews, static code analysis, security scans built into the process</p>	<ul style="list-style-type: none"> <li>• Builds changes efficiently and with quality</li> <li>• Identifies vulnerabilities and application issues early</li> <li>• Allows major changes to be made available in all languages quickly</li> </ul>

Current Processes		
<b>Testing</b>	Robust automation suite to conduct functional and regression tests. Cross Browser, Cross Device, Multi-Language testing automated and integrated with Selenium. County and User Acceptance Test Support	<ul style="list-style-type: none"> <li>Helps to identify issues prior to deployment and maintain quality of the application</li> <li>Helps counties and consortium testers augment their testing tasks and capacity</li> </ul>
<b>User Training</b>	Dedicated team and UCD processes to create visual and interactive training content for users on BenefitsCal through Help Center, FAQs, tool tips, etc. Work closely with the counties and the help desk to prepare fact sheets and user guides	<ul style="list-style-type: none"> <li>Allows users to interact efficiently with the application and learn on their own</li> <li>Guides county users through complex system changes with convenience</li> <li>Prepares call center team for end user support</li> </ul>
<b>Production Readiness</b>	Staging validation and deployment activities that align with Production Readiness and Green Light requirements	<ul style="list-style-type: none"> <li>Confirms release is ready to move to the production environment</li> </ul>
<b>Deploy</b>	Robust DevSecOps and configuration management practices Infrastructure as Code (IaC) through use of AWS SAM and Serverless Framework	<ul style="list-style-type: none"> <li>Confirms adherence to security standards throughout SDLC</li> <li>Identifies vulnerabilities early</li> <li>Allows smooth and quick deployments to all environments</li> </ul>
<b>Post-Production</b>	Conduct webinars to educate counties, CBOs, and other stakeholders Continuous production monitoring and analytics generated solely from BenefitsCal	<ul style="list-style-type: none"> <li>Prepares counties, CBOs, and others in the field to better assist customers</li> <li>Helps proactively identify system improvement opportunities</li> </ul>

**Table 4.2-8. Develop & Deploy—Current Processes.**

Future Enhancements		
Method	Description	Benefit
<b>Develop—Automated security scans</b>	Automated remediation of common security issues and config drifts using AWS config against a standard set of security baselines	<ul style="list-style-type: none"> <li>Security vulnerabilities and misconfigurations are identified and fixed promptly and in alignment with security policies and standards</li> </ul>
<b>Develop—Living Style Guides</b>	Mirrored version of atomic design framework within the application codebase	<ul style="list-style-type: none"> <li>Smooth one-to-one integration from across design and code library</li> <li>Increases speed and quality to delivery</li> <li>Decreases decision times via clear guidance to dev teams</li> </ul>

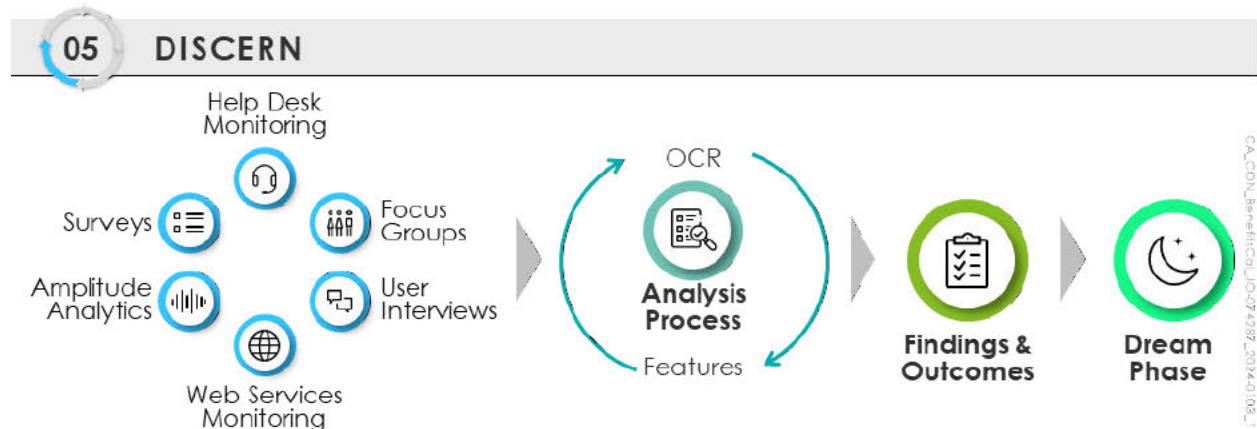


Future Enhancements		
		<ul style="list-style-type: none"> <li>• Enables higher visual consistency during test</li> <li>• Scalability, maintainability of the design and consistency across the SDLC</li> </ul>
<b>Test–Cross browser and Cross device testing</b>	Data-informed decision-making on adaptability across devices and browsers	<ul style="list-style-type: none"> <li>• Testing teams focus on metric driven scenarios to minimize device-specific issues</li> <li>• Track fallout or failures on a particular device</li> </ul>
<b>Test–Language Support</b>	Bring in native speakers from Deloitte's HHS practice for translation review support	<ul style="list-style-type: none"> <li>• Improves accuracy and quality of the translations</li> </ul>
<b>Test–Automated test case creation</b>	Use AI to automate test case creation based on the requirements or designs using IncidentIQ	<ul style="list-style-type: none"> <li>• Prioritize critical test cases</li> <li>• Saves cost by automating repetitive and time-consuming tasks</li> <li>• Improves speed of delivery</li> </ul>
<b>Test–A/B testing approach</b>	Tests multiple versions of the designs with users using an accelerator called Unleash	<ul style="list-style-type: none"> <li>• Allows groups of users to choose the best flow that works for them</li> </ul>
<b>Deploy–Release When Ready (RWR)</b>	Delivery of small increments of new functionalities in tandem with CalSAWS changes	<ul style="list-style-type: none"> <li>• Determines downstream impacts of an SCR to existing business processes</li> <li>• Provides flexibility to Release on Demand</li> </ul>
<b>Deploy</b>	Use Parameter store to manage environment specific configuration instead of version control	<ul style="list-style-type: none"> <li>• Helps maintain and update settings across different environments centrally</li> </ul>
<b>Train–Organizational Change Management process</b>	Identify organizational change management needs and vehicles early Conduct webinars for counties and CBOs	<ul style="list-style-type: none"> <li>• Allows counties and CBOs that assist the customers to better prepare, especially for large and complex functionalities</li> </ul>
<b>Post-production Monitoring</b>	Jointly produce and monitor production metrics with CalSAWS M&E and Infrastructure Contractors, where involved, with respect to the OKRs defined in the Dream phase and validated during Discover and Define phase	<ul style="list-style-type: none"> <li>• Validates enhancement performance output aligns with end-to-end OKRs identified for the feature</li> </ul>

**Table 4.2-9. Develop and Deploy—Future Enhancements.**

## 05 Discern

Within the Discern phase of our UCD life cycle, shown below in Figure 4.2-6, we meticulously analyze both qualitative and quantitative data. This stage leverages analytics to assess the effects of modifications and enhancements on the software and integrates these insights back into the iterative design and development process. By revisiting the OKRs set up in the Dream phase, we confirm that each iteration adheres to our strategic objectives and enhances precision in targeting developmental efforts. This analysis is crucial for evaluating the current implementations' effectiveness, pinpointing opportunities for refinement, and thus optimizing the design process to better meet user needs.



**Figure 4.2-6. Key Elements of the Discern Phase.**

### Why the Discern Phase Matters

The Discern phase establishes a direct link between our design choices and their impact on user satisfaction and adoption. This phase produces measurable outcomes that continuously refine the user experience through an adaptive, iterative design process, making design decisions both informed and impactful. This continuous loop of feedback and evaluation confirms that we meet our OKRs and effectively cater to various user, County, and stakeholder groups. The insights gained here are fed back into the Dream phase continuing the cycle of UCD process for BenefitsCal.

Tables 4.2-10 and 4.2-11 summarize the current BenefitsCal process and proposed enhancements for this phase of UCD.

Current Processes		
Method	Description	Benefit
Measurement reports	Bi-monthly, monthly, and quarterly, reports provide constant Customer Experience (CX) data points on applications, renewals, change reports, account management, support services, document	<ul style="list-style-type: none"> <li>Provides up-to-date snapshots of application performance.</li> <li>Informs new areas for improvement in the opportunity roster</li> </ul>



Current Processes		
	uploads with a view of BenefitsCal usage only	
<b>Always-on surveys</b>	General user feedback survey collection point across the application	<ul style="list-style-type: none"> <li>Creates an open pathway for user feedback to flow into the collaboration model process</li> </ul>
<b>Intercept surveys</b>	Specific experience focused on point-in-time feedback related to distinct experience points in the system	<ul style="list-style-type: none"> <li>Provides targeted experience feedback on specific flows to feed into the collaboration model process</li> </ul>

**Table 4.2-10. Discern—Current Processes.**

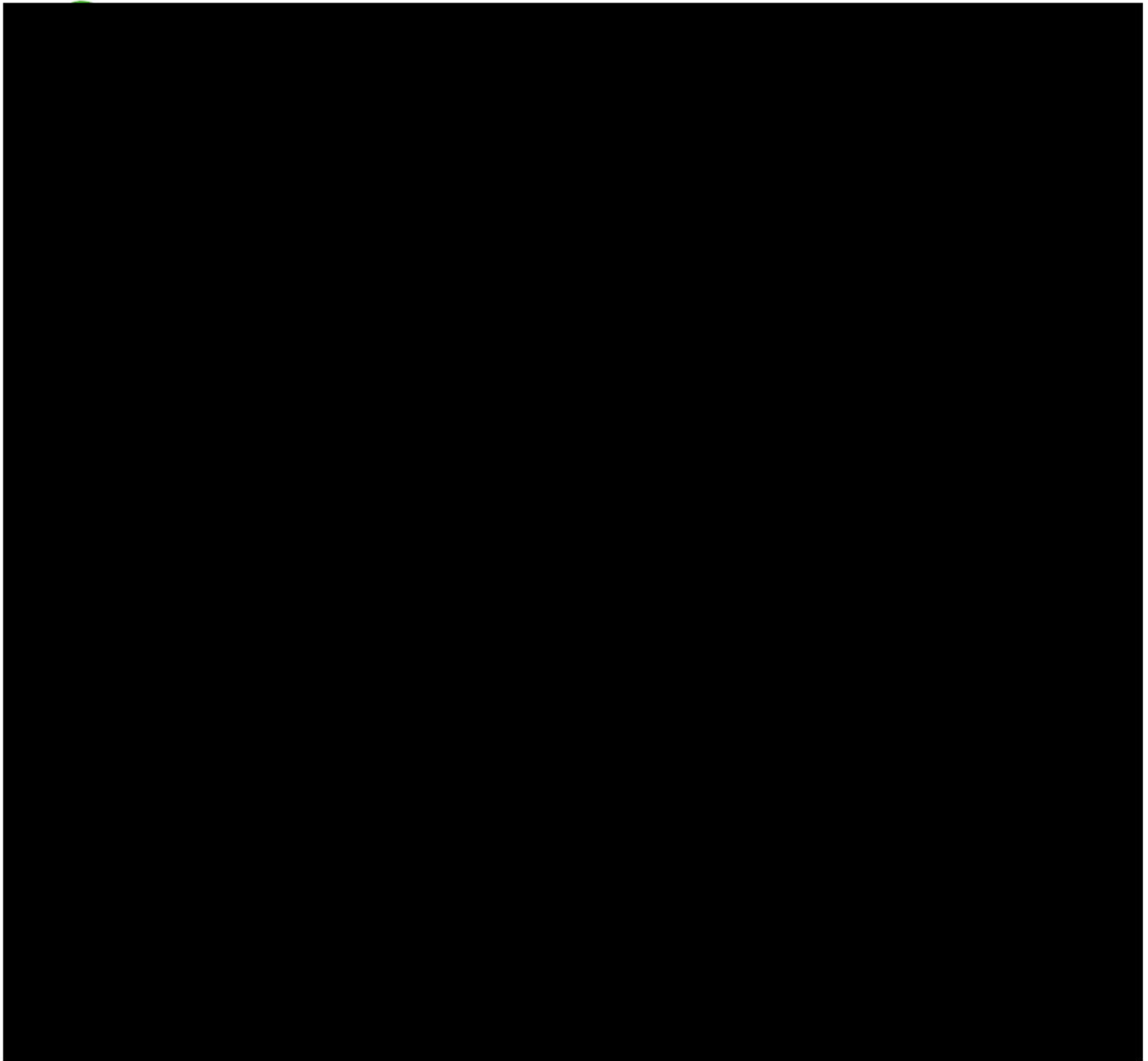
Future Enhancements		
Method	Description	Benefit
<b>Measurement of outcomes relevant to OKRs</b>	Assess the outcomes against key results defined for each enhancement and current system usage in Dream phase from an end-to-end view with data across the CalSAWS enterprise	<ul style="list-style-type: none"> <li>Provides actionable insights from system changes to drive prioritization and enhancements for future.</li> <li>Provides insights into focusing effort where there is increased return on investment.</li> <li>Provides a complete picture of impact on outcomes from Customers and CBOs self-serving through BenefitsCal</li> </ul>
<b>Floating Intercept Surveys</b>	Identify locations where the existing surveys can be taken to provide highest Return on Investment Integrate Intercept Survey Strategy with Marketing and Communications	<ul style="list-style-type: none"> <li>Targeted feedback collected from users to different areas of the application, increasing return on investment.</li> <li>Improves adoption by understanding the details of user interaction in different processes</li> </ul>
<b>Experience and data management tools</b>	Tools that can use AI to analyze structured and unstructured data from various sources (e.g., interview, focus groups, survey, help desk calls, county feedback) to make sense of customer trends	<ul style="list-style-type: none"> <li>Identifies gaps in data insights collected from various sources.</li> <li>Shortens the iteration cycle and providing clarity on prioritizing the most impactful enhancements.</li> <li>Understands evolving needs by managing complex research activities</li> </ul>
<b>Analytics dashboards</b>	Dashboards provide on-demand measurement of key metrics in the system in a concise way	<ul style="list-style-type: none"> <li>Consolidates complex data points into quick, comparable metrics for stakeholders to drive data-driven decisions</li> </ul>

**Table 4.2-11. Discern—Future Enhancements.**

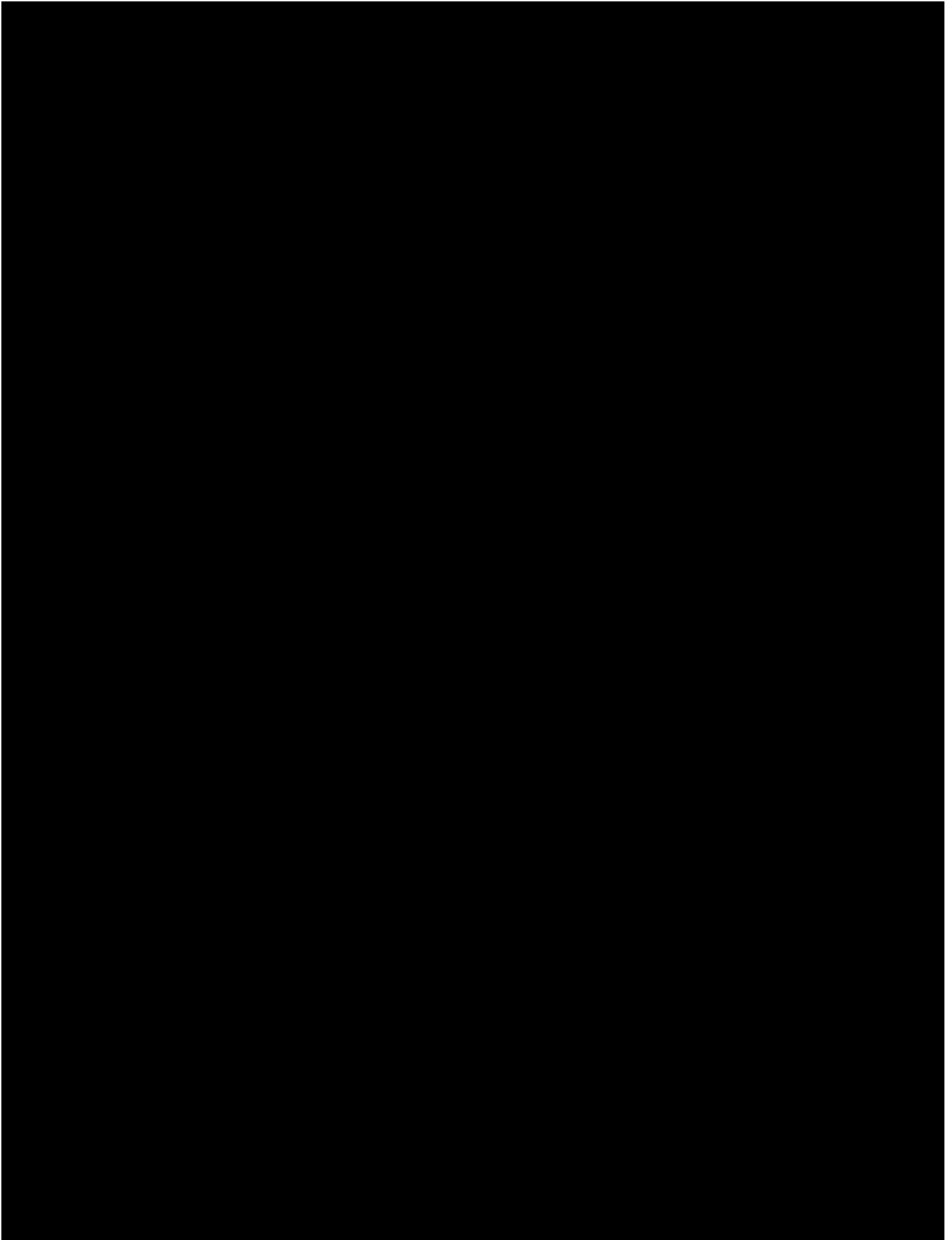
## Innovations to Accelerate and Improve the User-Centered Design Approach to BenefitsCal

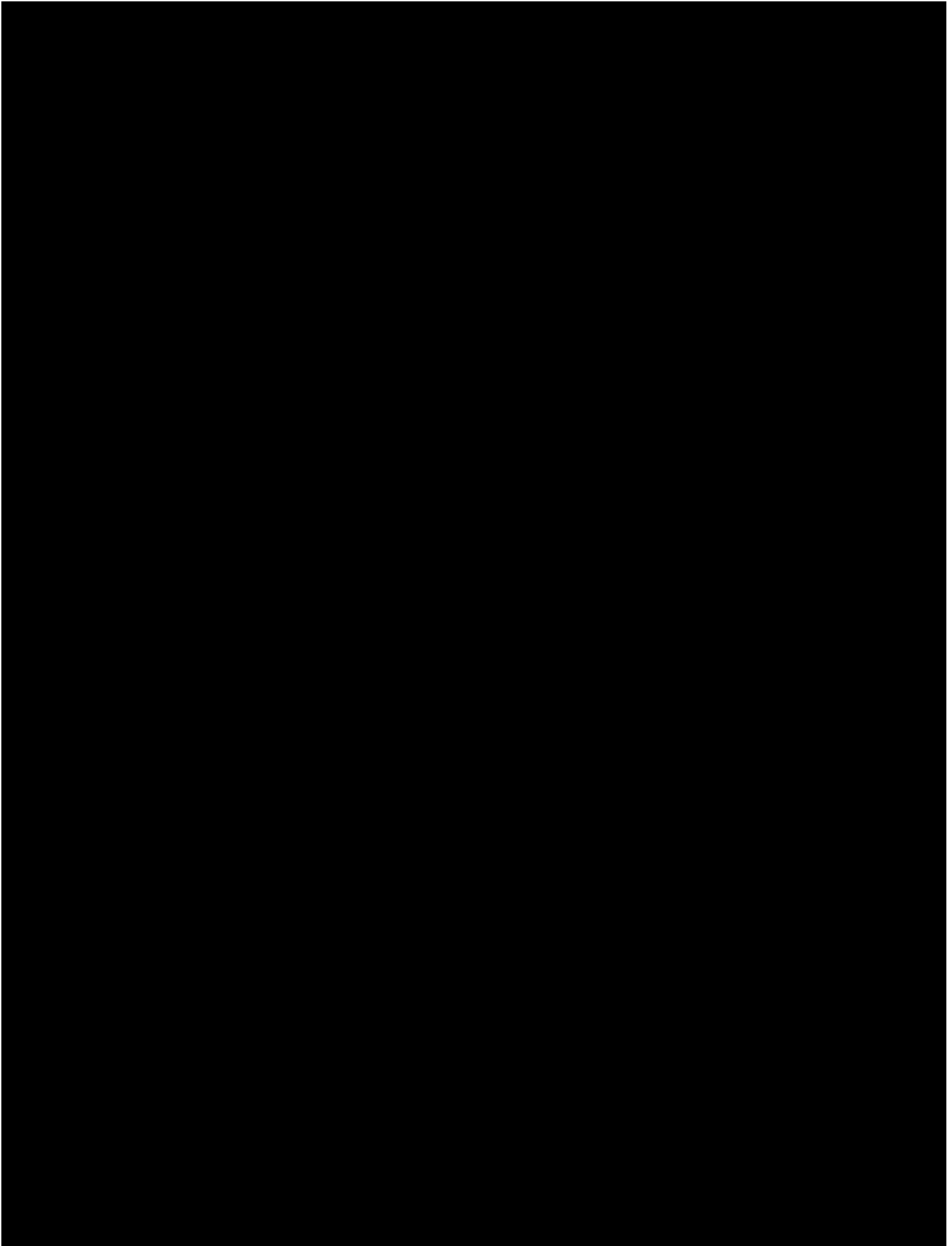
Deloitte's commitment to improving the User-Centered Design (UCD) lifecycle for BenefitsCal integrates innovative tools and methodologies that optimize user experience. By implementing accelerators and innovations, our approach refines existing processes and maximizes efficiency. These tools are tailored to meet the unique needs of BenefitsCal, confirming alignment with end users' expectations and enhancing user interaction with the platform.

Supporting these enhancements, advanced tools such as analytics platforms, AI-driven insights, and automated tools are deployed. These technologies enable an iterative design process, rapidly integrate user feedback into design updates. Leveraging Deloitte's proprietary tools and best practices, the UCD team delivers a personalized and engaging user experience, elevating satisfaction, and efficiency on BenefitsCal.













## Innovations to Accelerate and Improve

### FIGMA AI Tools

#### What is it?

Tools like Builder.io, Codify, and Anima are at the forefront of transforming Figma designs into foundational elements for high-fidelity interactive prototypes, crucial for user testing. These tools leverage the power of AI to interpret and convert designs into code and vice versa, enabling a more integrated and efficient workflow. By using LLMs to process and understand outputs, these plugins facilitate the creation of precise and interactive prototypes. This not only enhances the quality of user testing by providing more accurate representations of the final product but also streamlines the development process, allowing for rapid iterations based on user feedback and interaction data. This technology is pivotal in developing user-centric designs that can adapt and evolve based on concrete user engagement during testing phases.

#### Why it matters?

BenefitsCal today conducts user testing and designs sessions using low fidelity mock ups at the early stage of user centered design process. The feedback is incorporated and revised design is then taken through another round of usability testing with the customers and stakeholders after the code is built and deployed into a test environment. This process sometimes makes it difficult to incorporate feedback received in the second round.

To address this, increasing the fidelity of prototypes for user testing early in the lifecycle can significantly enhance the accuracy of the user experience feedback in the early stages. This approach not only reduces risks but also improves the quality of feedback on detailed elements that shape the user experience. This strategic shift confirms that feedback is integrated more seamlessly and effectively across the development stages.

Furthermore, aligning the design and code base with AI tools during the design to development phase can expedite speed of delivery. This enhancement in the deploy and deliver phase reduces the number of iteration cycles.

## 4.2.2 Strengthening Application Security Measures

### 5.2.3.2 Understanding and Approach to Software Development

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.

It is critical to strengthen security measures in a benefits portal that millions of Californians rely on for accessing public assistance benefits. Due to the sensitivity of the information processed in BenefitsCal, it is a prime target for cyberattacks such as identity theft, fraud, and ransomware. Deloitte's North Star for BenefitsCal security is to meet the security compliance requirements and continuously enhance BenefitsCal's security posture to mitigate the risks of an evolving security threat landscape and attack vectors. Continuously enhancing security measures strengthens the protection of BenefitsCal data and maintains the trust and confidence of the public in the Consortium's ability to safeguard their personal information.

Deloitte is a strong advocate for implementing stringent security and privacy measures. Security and privacy standards have been integral to the BenefitsCal solution buildout from the initial design and implemented throughout the build process. Deloitte has been a trusted advisor to the Consortium on security and privacy matters and taken proactive steps to mitigate potential security risks to BenefitsCal. The following are select proactive initiatives:

- Performed Zero Trust maturity assessment against Cybersecurity and Infrastructure Security Agency (CISA) Zero Trust Maturity Model 2.0 that resulted in maturity ranking score and proposed enhancements
- Shared national trends surrounding patterns in fraud (e.g., email dotting)
- Implemented Multi-Factor Authentication (MFA) for all BenefitsCal users
- Enhanced AWS Web Application Firewall with intelligent rules and configuration changes, blocking potentially malicious traffic from accessing BenefitsCal

BenefitsCal is protected without compromising user experience by implementing secure design principles, a strategic approach, DevSecOps methodology, and proactive security controls, as elaborated in later sections.

#### DISTINGUISHING FACTORS



As part of BenefitsCal, the Deloitte Security has accomplished:

- CI/CD includes integration of application security controls
- Solid foundation of protection across end-end secure operations
- Established framework with features to reduce security risks within applications and supporting infrastructure
- Secure, stable, and security-compliant BenefitsCal system via efficient and effective integration of security phase gates



Approach to Strengthen BenefitsCal Security

Our BenefitsCal security strategy has a four-thread approach to proactively include security considerations and minimize operational security risks, as shown in Figure 4.2-9.

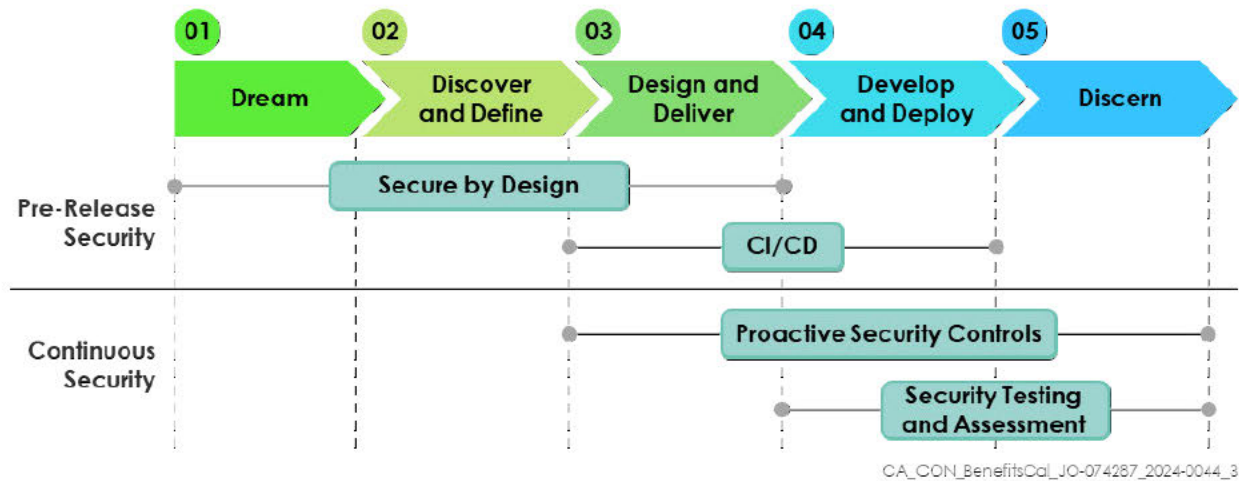


Figure 4.2-9. Security Phases in Alignment with UCD Phases.

Secure By Design

Secure and reliable access to BenefitsCal is critical to the Consortium mission of delivering valuable and innovative services to meet the evolving needs of Californians. Deloitte grasps the complexity of Consortium's security and IT ecosystems that BenefitsCal integrates with and relies on for its operations. From the initial design of the security controls for BenefitsCal, we continue to revisit the design to re-evaluate the controls against the evolving threat landscape and insights from changes in the industry. Our guiding principles to continue elevating the security posture of BenefitsCal, throughout SDLC phases, are outlined in Figure 4.2-10 and Table 4.2-12.



Figure 4.2-10. Security Guiding Principles.

Examples of how we have applied and continue to apply these principles are captured in Table 4.2-12.

Principle	Current State	Proposed Enhancements	What is the Benefit?
Defense in Depth	Adheres to AWS Well-Architected Framework	Evolve static controls to dynamic controls that adapt to changes in traffic	<ul style="list-style-type: none"><li>BenefitsCal remains available and resilient</li></ul>

Principle	Current State	Proposed Enhancements	What is the Benefit?
	for network and cloud security controls	as part of automated security response	through layering security to minimize blast radius
<b>Grant Least Privilege</b>	Access provisioned with Role-Based Access Control, following least-privilege principles, allowing users to only see data and perform allowable operations	Use Privileged Access Management solutions for protecting BenefitsCal's AWS infrastructure that automate access management for just-in-time access provisioning	<ul style="list-style-type: none"> <li>Enhances security by reducing the attack surface of overly permissive access roles</li> </ul>
<b>Separation of Duties</b>	BenefitsCal team responsibilities segmented among personnel to mitigate security risks and enhance operational integrity	Perform periodic rotation of duties for privileged administrator roles	<ul style="list-style-type: none"> <li>Enhances security by minimizing unauthorized access and potential for error or misuse</li> </ul>
<b>Fail Safety</b>	BenefitsCal security architecture with rigorous error-handling and validation mechanisms to prevent system failures	Apply fault-isolated boundaries throughout the BenefitsCal workloads to minimize blast radius of individual component failures	<ul style="list-style-type: none"> <li>Minimizes potential downtime and safeguards data integrity and system availability</li> </ul>
<b>Avoid Security by Obscurity</b>	BenefitsCal protection not relying on hidden processes or obscure configurations	Improved integration with threat intelligence sources for enhanced Consortium stakeholders' visibility and transparency on security and privacy risks	<ul style="list-style-type: none"> <li>Transparency facilitates easier security collaboration and understanding for taking proactive actions</li> </ul>
<b>Apply Open Design</b>	BenefitsCal team maintains transparency to its security architecture and design principles through design deliverables and joint architecture reviews.	Use AWS Security Hub for insight into continuous reporting and remediation of BenefitsCal's AWS security posture	<ul style="list-style-type: none"> <li>Enhances security and increases trust through effective scrutiny and transparency</li> </ul>
<b>Isolate Services</b>	BenefitsCal critical functionalities are isolated into separate functions that each run in its own execution environment.	Automated testing of simulated failures of BenefitsCal's functions to validate and diagnose potential unforeseen areas of dependency	<ul style="list-style-type: none"> <li>Enhances security by isolating services and reducing potential points of failure</li> </ul>
<b>Minimize Attack Surface</b>	Risk assessment, threat modeling, and security testing throughout the BenefitsCal development and operations	Evolve security controls in alignment of CISA's Zero Trust Maturity Model for application and infrastructure protection	<ul style="list-style-type: none"> <li>Reduction in avenues of attack leading to reduced vulnerability risk and faster incident response through limited areas to investigate</li> </ul>

**Table 4.2-12. BenefitsCal Security Guiding Principles.**



CI/CD Process

Producing high-quality and secure code is a critical success factor for our team while managing BenefitsCal. The Consortium’s vision is to automate a CI/CD pipeline to detect and remediate vulnerabilities and threats. To fulfill this vision, we enhance code quality and application security with the appropriate security controls. We integrate security steps such as secure code reviews, software composition analysis, and application security testing in a continuous and automated manner throughout the development life cycle in the CI/CD pipeline, as shown in Figure 4.2-11. This figure identifies the security activities that occur in and along with the CI/CD integration for a secure release of changes and enhancements.

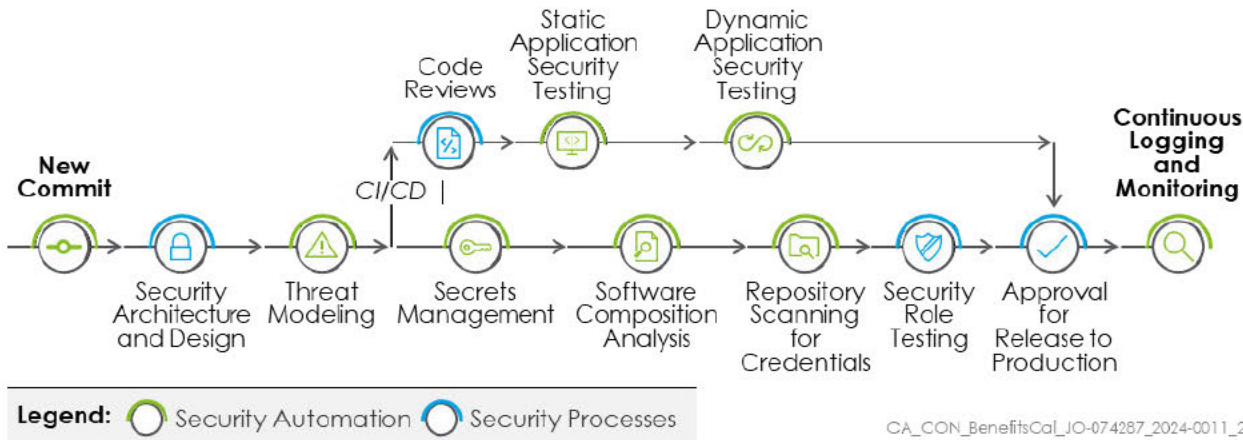


Figure 4.2-11. BenefitsCal CI/CD Pipeline with Integrated Security Measures.

Table 4.2-13 shows the Deloitte approach to security activities and improvement of the security posture during the development and release cycle. Throughout the pipeline, we leverage leading security products, such as Fortify, and CloudCheckr, to perform automated scanning and reporting.

Activity	Current State	Proposed Enhancements	What is the Benefit?
Security Architecture Design	Baseline security policies developed for AWS infrastructure	Automate security checks changes to BenefitsCal's IaC configurations preventing insecure changes to resources	<ul style="list-style-type: none"><li>Protects BenefitsCal data integrity, confidentiality, and availability</li></ul>
Threat Modeling	Threat modeling by BenefitsCal to identify, prioritize, and avoid potential threats	Integrate automated threat modeling solutions in pipeline to evaluate and report on threats based on new deployments	<ul style="list-style-type: none"><li>Better detection and mitigation of vulnerabilities by identifying new threats in real time</li></ul>
Code Reviews	BenefitsCal Development Team conducts peer code reviews to improve integrity of the code change prior to check-in.	Spot-check code reviews to validate they are conducted in alignment with expectations.	<ul style="list-style-type: none"><li>Reduces potential for security vulnerabilities or system failures by catching issues earlier.</li></ul>



Activity	Current State	Proposed Enhancements	What is the Benefit?
<b>Secrets Management</b>	BenefitsCal secrets are securely stored and managed.	Enhance secrets management with automated rotation and stricter access privileges.	<ul style="list-style-type: none"> <li>Reduces risk of unauthorized access or data breaches.</li> </ul>
<b>Static Application Security Testing (SAST)</b>	Regular scans of application source code and binaries by BenefitsCal to detect vulnerabilities	Integrate automated SAST scans in CI/CD pipeline	<ul style="list-style-type: none"> <li>Early detection of vulnerabilities in code and reduced risk of exposure</li> </ul>
<b>Dynamic Application Security Testing (DAST)</b>	DAST testing conducted of BenefitsCal releases to identify security vulnerabilities prior to deployment in Production	Out of band application security testing supplementing internal DAST to test from an outsider perspective	<ul style="list-style-type: none"> <li>Allows simulation of real-world attacks to prioritize findings</li> </ul>
<b>Security Role Testing</b>	Application security scans conducted with each access role	Expansion of security role testing from Application scope to include roles in AWS Infrastructure	<ul style="list-style-type: none"> <li>Verifies users only have permissions for operations and visibility of data to which they are entitled</li> <li>Validate the separation-of-duty and least-privilege principles</li> </ul>
<b>Repository scanning for credentials, Personally Identifiable Information (PII)</b>	Code repositories scanned by BenefitsCal Security team for secrets, keys, and credentials as part of SAST	Automate discovery, notification, and remediation for continuous scanning of secrets	<ul style="list-style-type: none"> <li>Discovering and preventing exposed sensitive information before it can be exploited or disclosed</li> </ul>
<b>Continuous Monitoring and Logging</b>	Logging configured with AWS CloudWatch for events in BenefitsCal	Integrate with CalSAWS centralized Security Event and Incident Management (SEIM) solution to provide single glass pane view of security events	<ul style="list-style-type: none"> <li>Helps manage and reduce operational risks.</li> <li>Improves security posture and resilience through continuous compliance monitoring.</li> </ul>

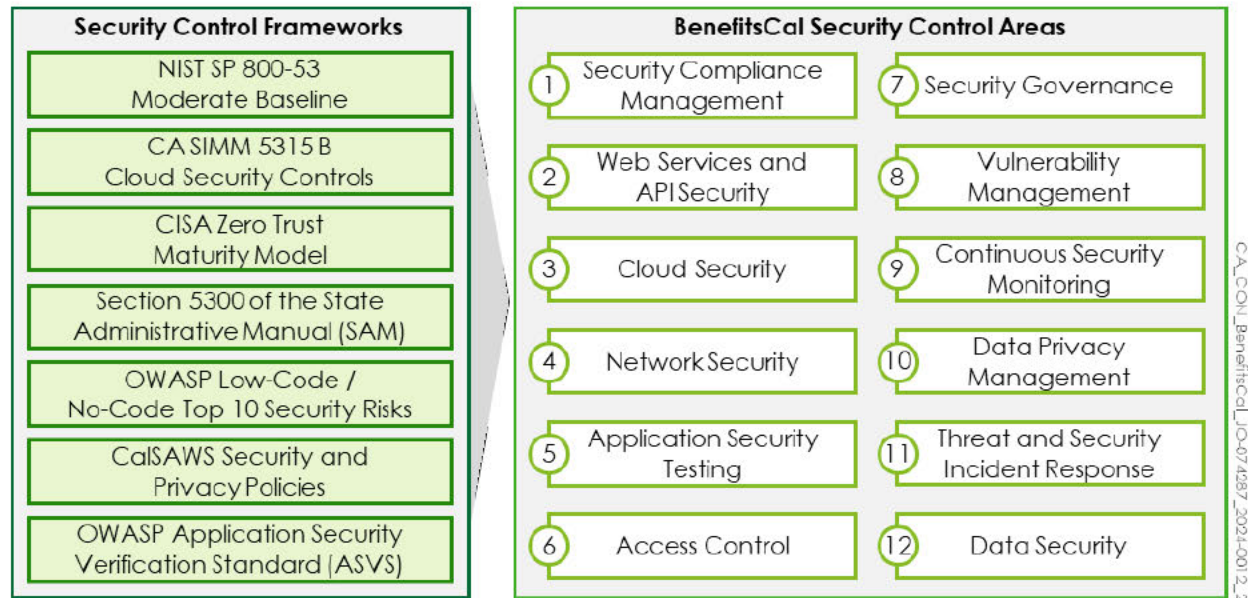
**Table 4.2-13. BenefitsCal CI/CD Security Phases.**

### Proactive Security Controls

Deloitte works closely with Consortium Security to integrate security activities throughout the system life cycle, enabling prompt, risk-based identification and remediation of vulnerabilities and gaps. To continuously improve the BenefitsCal security and compliance posture, Deloitte uses the security and privacy framework outlined in Figure 4.2-12. Furthermore, we monitor evolving security threat landscape and compliance needs to implement and maintain security controls to appropriately secure



the confidentiality, availability, and integrity of data that Californians have entrusted to the Consortium.



**Figure 4.2-12. Using Leading Security Frameworks for Proactive Secure Controls.**

Our solution adheres to the policies, standards, and guidelines provided by California, the federal government, and pertinent agencies. As part of the system security process, we enhance our System Security Plan and keep it current with the Consortium's requirements, including the CalSAWS Privacy and Security Agreements and other compliance obligations.

The Consortium seeks to align with NIST 800-53 Rev. 5, as the current security posture uses the NIST 800-53 Rev. 4. As part of the continuous improvement, Deloitte plans to work closely with Consortium Security on the transition to Rev. 5 and implement required enhancements (e.g., supply chain risk management, identity and access management, information classification) and build additional security and privacy process and procedural updates to meet the revised standard as shown in Tables 4.2-14 and 4.2-15.

Control Areas	Current State	Proposed Enhancements	What is the Benefit?
<b>Security Compliance Management</b>	BenefitsCal is compliant with NIST 800-53 Rev 4 standards	Working with Consortium to support implementation of controls for compliance with NIST 800-53 Rev 5	<ul style="list-style-type: none"> <li>Compliance with latest leading security standard to mitigate against evolving security threats</li> </ul>
<b>Web Services &amp; API Security</b>	Adheres to security standards such as OWASP (Open Web Application Security Project) guidelines	Minimize attacks by implementing intelligent DDoS protection by AWS using Machine Learning	<ul style="list-style-type: none"> <li>Protects critical infrastructure from overuse, abuse, unauthorized access from both internal and external threats</li> </ul>
<b>Cloud Security</b>	Cloud security controls implemented	Enhance BenefitsCal's cloud security posture in	<ul style="list-style-type: none"> <li>Improves mean time to prevent, detect, contain,</li> </ul>



Control Areas	Current State	Proposed Enhancements	What is the Benefit?
	and evaluated manually using CloudCheckr	relation to AWS accounts using AWS Security Hub services and best practice security checks and enabled and automated remediation	and respond to cyberattacks against cloud security assets
<b>Network Security</b>	Use static rules in AWS Web Application Firewall and Security Group Rules to protect network	Integrate intelligent threat managed services in AWS Web Application Firewall to apply Machine Learning to react to abnormal login and registration behavior	<ul style="list-style-type: none"> <li>Improves network security and protection against adversaries and attacks (e.g., lateral movement, Distributed Denial-of-Service (DDoS) attacks) mitigating potential cyber threats</li> </ul>
<b>Application Security Testing</b>	Perform SAST and DAST scans on a regular basis and raise defects after analysis	Using automated tools integrated into the CI/CD pipeline for continuous scans and alerts or blocks on detected vulnerabilities in commits	<ul style="list-style-type: none"> <li>Identifying security vulnerabilities early in the development process, providing cheaper resolutions and immediate feedback to developers</li> </ul>
<b>Access Control</b>	Implementing access controls with fine and coarse grain based on user roles, including Multi-Factor Authentication	Implementing intelligent access controls adhering to the least-privilege principle and reacting to abnormal user behavior with risk-based authentication	<ul style="list-style-type: none"> <li>Mitigating risk to Consortium of compromised credentials of end users by minimizing blast radius and preventing unauthorized access</li> </ul>
<b>Security Governance</b>	BenefitsCal Security coordinates changes to policies, procedures, and technologies with Consortium Security	Collaborating with Consortium and other vendors to form a Security Council that shares insights and directions on securing the overall CalSAWS ecosystem	<ul style="list-style-type: none"> <li>Providing a forward-looking security roadmap with best practices for implementation throughout CalSAWS</li> </ul>
<b>Vulnerability Management</b>	Vulnerabilities identified in SAST, DAST, or Cloud Security are manually analyzed, tracked, and reported	Managing vulnerabilities by integrating scanning tools with BenefitsCal ticketing for automated tracking throughout the vulnerability life cycle	<ul style="list-style-type: none"> <li>Providing current and accurate insights into vulnerabilities for executive and development team reports, along with offering mitigation strategies</li> </ul>
<b>Continuous Security Monitoring</b>	Security events are logged in AWS CloudTrail and alarms configured in AWS based on thresholds	Ingest BenefitsCal security events into CalSAWS SIEM and develop runbooks to take automated actions	<ul style="list-style-type: none"> <li>Providing proactive, accelerated detection and response, minimizing disruption</li> </ul>



Control Areas	Current State	Proposed Enhancements	What is the Benefit?
<b>Data Privacy Management</b>	BenefitsCal publishing and informing Californians about their rights regarding data collection, storage, and usage	Providing transparency reports to Californians on how and why their private data has been accessed	<ul style="list-style-type: none"> <li>Californians deserve to have their data protected and to trust BenefitsCal</li> </ul>
<b>Threat &amp; Security Incident Response</b>	Incident handling in response to alerts or reports, limited to siloed information	Supporting the Consortium to implement intelligence-driven threat detections and responses for prompt, proactive handling of complex incidents	<ul style="list-style-type: none"> <li>Applying intelligent and automated incident responses reduces risk and effort for Consortium</li> </ul>
<b>Data Security</b>	Data is protected with access controls and encryption in transit, at rest, and in use.	Apply Defense in Depth for data security with data loss prevention technologies and least privilege access controls.	<ul style="list-style-type: none"> <li>Defending data across all layers to prevent undesired disclosure</li> </ul>

**Table 4.2-14. Vision for BenefitsCal Security and Privacy.**

### Security Testing and Assessment

Our approach incorporates security testing and assessments in the pre-release phase, as well as in the continued security operations post-release. In addition to the CI/CD testing conducted pre-release, we focus on the following areas for verification of BenefitsCal security at every layer.

Focus Area	Current State	Proposed Enhancements	What is the Benefit?
<b>Security Control Assessment</b>	Conducting regular Security Control Assessments through System Security Plan updates	Engaging an independent assessor for validating design and implementation of security controls	<ul style="list-style-type: none"> <li>Verifying the measures that protect and defend BenefitsCal re-enforces trust in its security</li> </ul>
<b>Penetration Testing</b>	Performing penetration testing through annual independent testing and regular application security testing	Engaging an independent penetration testing team for ad hoc assessments in response to zero-day vulnerability disclosures impacting BenefitsCal	<ul style="list-style-type: none"> <li>Validating BenefitsCal security through real-world testing of potential attack methods keeps bad actors from misusing BenefitsCal</li> </ul>
<b>Disaster Recovery Testing</b>	Disaster recovery capabilities in BenefitsCal, designed and implemented, tested through simulated failover and fallback exercises	Coordinating an enterprise-wide simulation with Consortium and other vendors for comprehensive testing	<ul style="list-style-type: none"> <li>BenefitsCal's availability crucial for continuous, effective public assistance delivery; disruptions could adversely affect dependent Californians</li> </ul>



Focus Area	Current State	Proposed Enhancements	What is the Benefit?
Fraud Detection and Response	Deloitte's initial assessment focused on investigating fraudulent activities	Proactively identify and respond to patterns of suspicious activity and emerging fraud threats	<ul style="list-style-type: none"><li>Maintaining integrity in benefit programs to uphold the Consortium's reputation and support those in need</li></ul>

Table 4.2-15. Benefits Security Testing.

Fraud Detection and Response

Fraud poses risk to the Consortium as fraudsters are constantly finding new ways to target and divert funds from critical programs. To support program integrity and help verify that benefits go to those in need, a key BenefitsCal solution security component is Fraud, Waste, and Abuse (FWA) prevention, detection, and response capabilities as illustrated in Figure 4.2-13. Deloitte's current methods to detect and prevent FWA are grounded in analysis that looks for known patterns of suspicious activity and for unknown and emerging fraud trends.



Figure 4.2-13. Features Overview of Deloitte's Fraud, Waste, and Abuse Prevention.

As an example of our FWA capabilities, in 2024, Deloitte proactively provided the Consortium with investigative analytics to determine impacts to BenefitsCal from a security incident originating in the Consortium's Identity and Access Management system. Deloitte supported the Consortium in identification of impacted accounts, conducted a threat assessment, and analyzed system access behavior. We leverage this groundwork to allow us to quickly implement a broader FWA prevention, detection, and response solution.

Collaborating closely with the Consortium, we are dedicated to effectively managing and minimizing security risks for BenefitsCal, continuously evolving to align with strategic security objectives. This partnership underscores our commitment to safeguarding the information of Californians who rely on BenefitsCal, recognizing the importance of each individual's trust in our services. Security and UCD are deeply interconnected, enhancing both the user experience and system safety. By integrating security from the early stages of UCD in the design of interfaces and systems, we prioritize meeting user needs while actively protecting their data and privacy. Our approach to secure software development, including CI/CD and proactive, continuous monitoring, advances BenefitsCal's security posture. This comprehensive strategy not only protects users but also builds a foundation of trust and satisfaction, reflecting the importance of the services they depend on and, by extension, their significance to us.



## 4.3 Application Evolution and Innovation

### 5.2.3.3 Understanding and Approach to Application Evolution and Innovation

In the rapidly evolving world of technology, CalSAWS has consistently led advancements in public service delivery. Since deploying BenefitsCal in 2021, we have seen a measurable increase in user self-sufficiency, exemplified by more than 50 percent of applications and more than 30 percent renewals now being submitted through BenefitsCal, reducing in-person office visits across Counties. This success reflects our progressive, cloud-native enterprise architecture that anticipates technology trends. Looking forward, CalSAWS is set to revolutionize service delivery further by expanding the use of innovative technologies such as Artificial Intelligence (AI). These advancements enable us to refine BenefitsCal's enterprise architecture, fuel innovation, and exceed our constituents' expectations. Our ongoing goal is to help California continue to set the standard in Eligibility & Enrollment (E&E) services.

To propel the evolution of BenefitsCal, CalSAWS requires a teaming partner who understands the **CalSAWS ecosystem, brings program eminence, and excels at innovation**. Deloitte checks all three boxes. We are ready to continue fulfilling the Consortium's vision.

**CalSAWS Ecosystem Understanding—Deloitte's Runs Deep:** Deloitte has extensively engaged with BenefitsCal. We understand the dynamic stakeholder and technical ecosystem. With over three years of collaboration with CalSAWS, we have launched the portal with a future-ready architecture and refined stakeholder collaboration processes. We also provided extended support to 18 County-level implementations during the move to BenefitsCal. Our knowledge is a differentiator. It gives us a competitive edge in meeting your needs and delivering sustained value from Day One of the new contract.

**Program Eminence—Our Network Is Your Network:** We offer you access to innovative solutions and accelerators through our extensive HHS Network across 31 states and the HHS Nerve Center. It is a big team effort, and everybody wins. Deloitte's innovations in California, for instance, inspired Florida to modernize its portal. Florida now handles over 90 percent of its applications with our BenefitsCal model. In Louisiana, we integrated text messaging into the E&E system to improve customer service just as we have done on BenefitsCal providing the ability for the users to receive their application or document upload confirmation receipt via text message or email.

**Innovation—We Cut the Edge:** A notable BenefitsCal innovation was the "No Touch SAR 7." This streamlined the semi-annual reporting process and improved service delivery, with more than **41,000** reports submitted via BenefitsCal. Over the past five years, we

#### SECTION HIGHLIGHTS



##### Why Choose Deloitte?

- Demonstrated E&E innovation record across 31 states over 40 years, and 26 current clients
- Global leader in innovation supporting 2,000+ innovation programs around the globe
- 9 research centers, with 120+ full-time staff, producing publications and hosting immersive events on emerging trends across industry verticals



have supported more than 250 organizations globally in innovation initiatives, including 35 public sector entities just last year.

## Understanding and Key Considerations

The Consortium expects the BenefitsCal vendor to continuously enhance its infrastructure, applications, and processes via modern technologies and methods. The goal is to keep the application progressive, secure, and beneficial for public users, CBOs, and Counties. The vendor should lead in introducing and expanding technologies such as AI to improve code quality and coding assistance, advanced chatbot features using Natural Language Processing (NLP), and video navigation capabilities. Moreover, the vendor is expected to drive operational and process improvements with technological innovation to facilitate the system's ongoing relevance and ability to support California's HHS programs.

Our approach to infusing innovation into our proposed BenefitsCal solution includes the success factors in Table 4.3-1.

Success Factors	Impact of Our Approach
<b>Stakeholder Collaboration</b>	We prioritize stakeholder engagement in our quarterly Collaboration Model and monthly User-Centered Design (UCD) meetings. Our approach emphasizes equity and inclusion and keeps users at the core of our innovation processes. This strategy aligns with the Consortium's expectations for integrating varied stakeholder inputs into BenefitsCal system enhancements.
<b>Adaptable Solutions for Diverse County Needs</b>	Recognizing the diverse needs of California's 58 Counties, we have developed adaptable and configurable solutions for BenefitsCal, such as live chat, "Call me," and two-way messaging. This flexibility enables each County to customize solutions according to its specific customer bases and business processes. We are committed to advanced feature management tools, like LaunchDarkly, to facilitate targeted changes. This allows Counties to have enough time to adapt to new technologies and processes.
<b>Shift from Technology-First Perspective</b>	Our holistic approach to innovation focuses on opportunities in the entire BenefitsCal process. We integrate innovative technologies, examine underlying business processes, and evaluate stakeholder impacts. The idea is to align with the Consortium's goal of extending system life through relevant and sustainable innovations. We demonstrate this method in our comprehensive change management packets and training sessions that accompany key enhancements.
<b>User-Driven Development</b>	Our evolution and innovation are fueled by real-world needs, identified via stakeholder engagement and UCD research. By addressing challenges pinpointed by County staff and customers, we deliver a tangible return on investment and enhance service delivery. Our monitoring of system interactions (e.g., premature workflow exits, click counts, and time spent on pages) enables us to propose enhancements that reduce call times and volumes.



Success Factors	Impact of Our Approach
<b>Innovation as Culture</b>	Innovation is integral to our operations. We make creative use of existing resources to maximize impact. This approach goes beyond technology to enhance business processes and improve workflow efficiency and cross-functional collaboration. This boosts our effectiveness in meeting HHS strategic goals. For instance, enabling two-way communication between customers and caseworkers in BenefitsCal has significantly increased self-sufficiency, reduced call wait times, and expedited benefit determinations.

**Table 4.3-1. Success Factors in Our Application Evolution and Innovation Approach.**

## Assessing How Far We Have Come

We have come quite a long way since launching BenefitsCal. The relationship between CalSAWS and Deloitte has driven innovation and operational excellence. Together, we have significantly improved self-service capabilities, with **70 percent** of food, **76 percent** of cash, and **38 percent** of Medi-Cal applications now submitted through BenefitsCal. This has significantly reduced County office visits and increased user independence. The platform's ability to support thousands of users simultaneously underscores our architecture's robustness.

Our adoption of Optical Character Recognition (OCR) technology for report processing has boosted worker efficiency and technological capabilities. The integration of the Lex chatbot has improved the digital customer experience. These achievements, among others, illustrate Deloitte's dedication to our shared goals and our ability to meet your challenges and deliver satisfying results.

Figure 4.3-1 below illustrates the progressive development and scaling of BenefitsCal since its inception. We view the next contract as a continuous journey, not merely a destination.



"It's nice that you can do everything on your phone... You don't have to fill out paperwork or go to the county office."

*Customer from Alameda County*



*Gretchen Larson*  
**Product Manager**

Throughout her tenure as a Product Manager serving various federal and commercial clients, Gretchen has consistently championed a user-centric approach to deploying digital enterprise solutions. She has spearheaded the introduction of innovative technologies and processes across numerous projects, with a strong focus on leveraging Low Code No Code Architecture. Whether it's defining and constructing a new financial credit system or developing a scholarship award and payment management system, Gretchen has exhibited exceptional leadership. She effectively collaborates with cross-functional teams to transform product vision and strategy into precise requirements and technical specifications. Gretchen has a proven track record of developing cross-platform digital product features for the public sector that not only meet but also exceed the expectations of the end-users. Her vast experience and innovative outlook to BenefitsCal are set to significantly enhance the application, connecting more Californians to the benefits they require.

“My job is to figure out what customers are going to want before they do.”

## BenefitsCal Foundational Capabilities – Outcomes We Have Achieved Together!

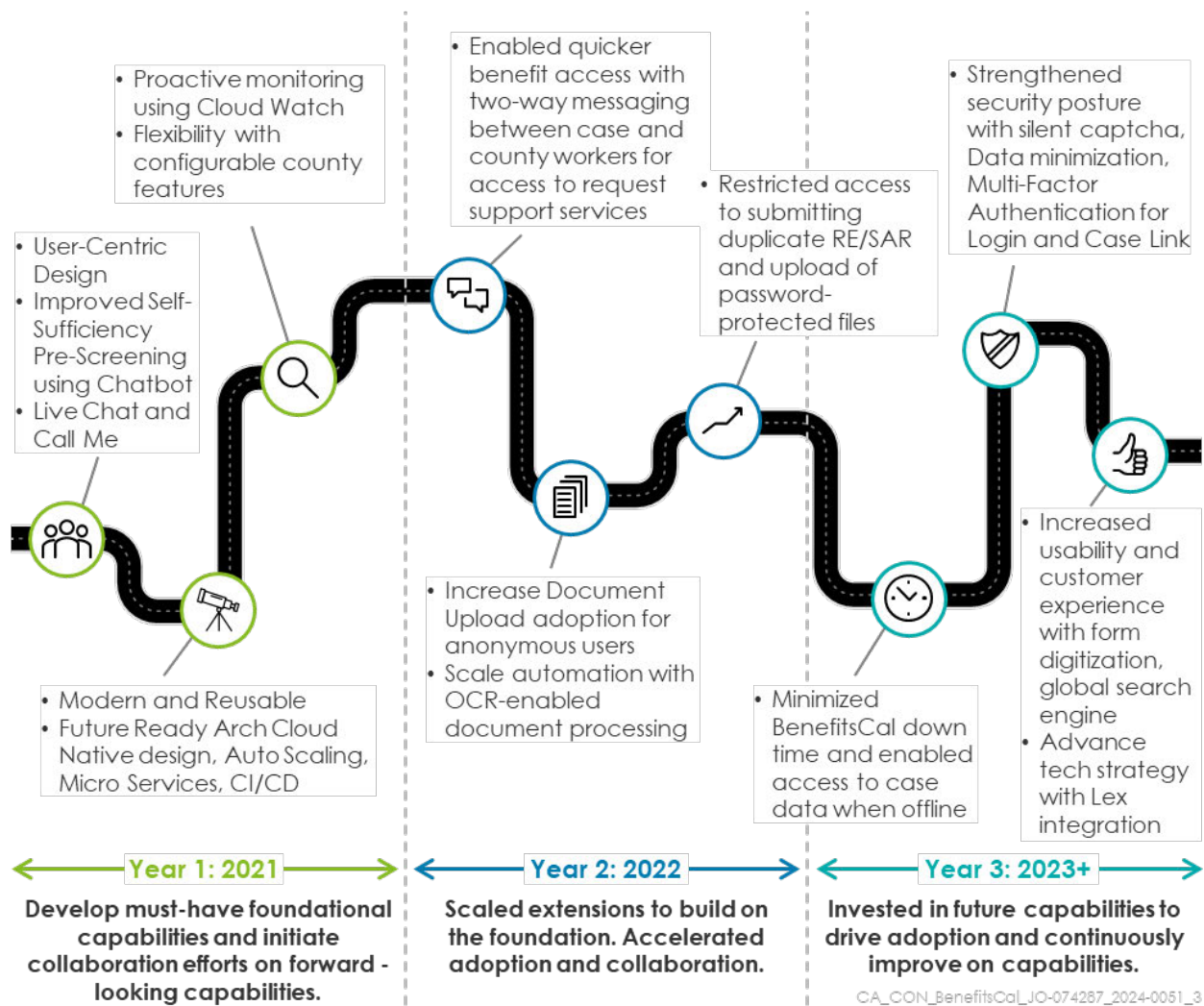


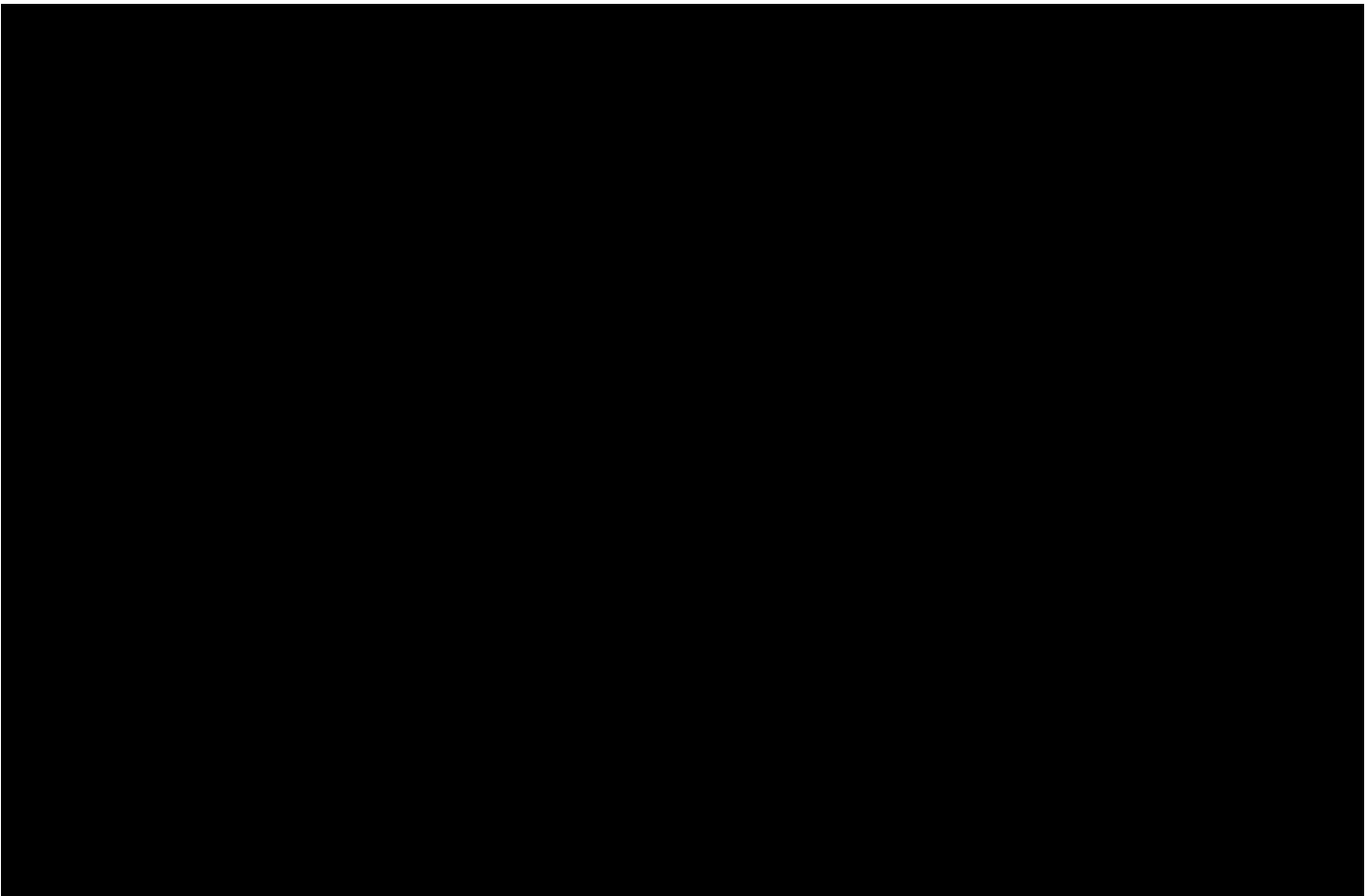
Figure 4.3-1. Self-Service Outcomes Achieved Together.

## How Deloitte Can Help You Reach a Crescendo

As we look to the future, we see numerous opportunities to improve and transform **BenefitsCal**. Integrating interactive and immersive technologies, such as **chatbots and AI**, we can reduce dependency on County help desks, lower call volumes, and boost worker productivity.

We plan to strengthen our core **enterprise architecture** to accommodate sophisticated technologies. We also plan to elevate operational capabilities and continue to fortify our security framework. Based on our understanding of **BenefitsCal users' needs**, we can enhance the user experience and **drive program efficiencies**. We seek to work with **CalSAWS stakeholders** to finalize our proposed **Future Vision Roadmap**. Figure 4.3-2 illustrates keyways we can launch BenefitsCal into the future.





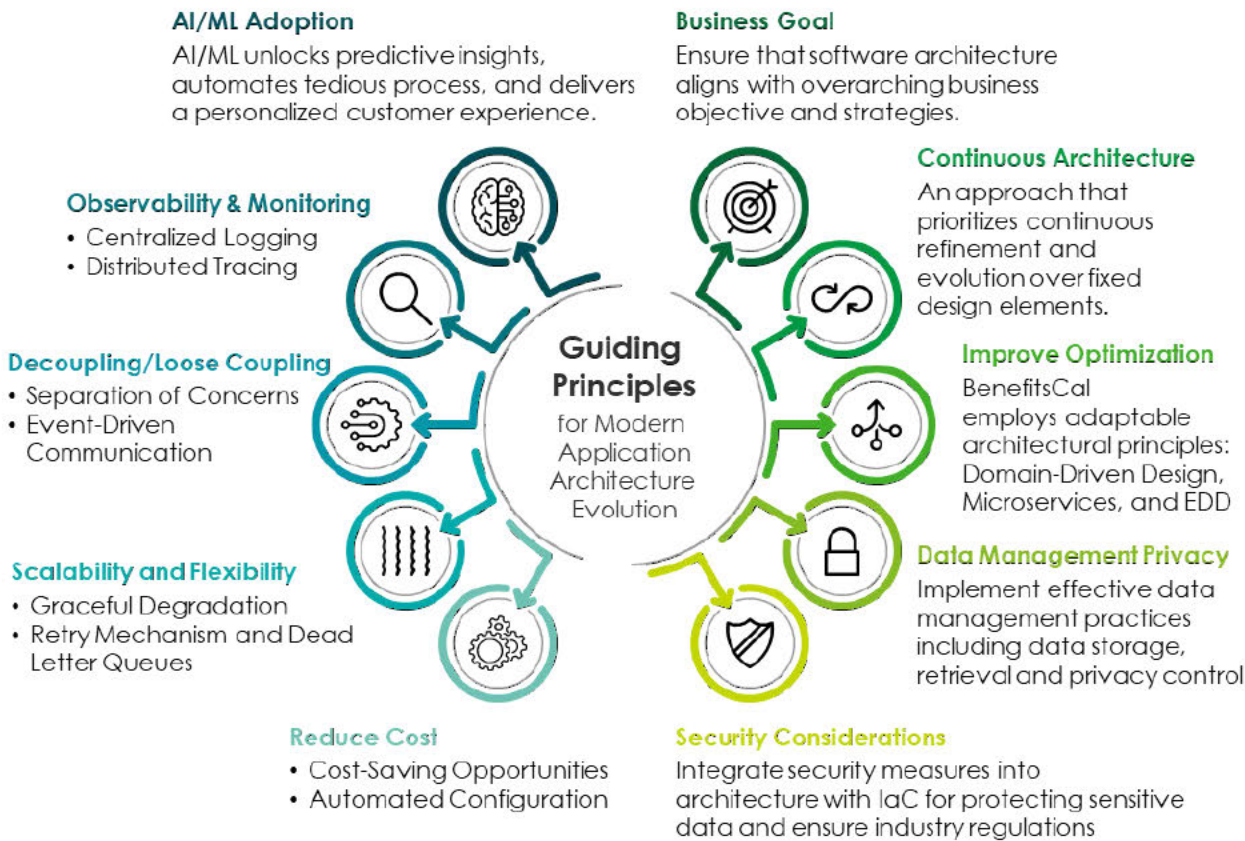
Deloitte brings a structured approach that aligns with the six phases of **Deloitte's UCD Software Development Life Cycle (SDLC): Dream, Discover, Define, Design & Deliver, Develop and Deploy, and Discern**. This life cycle spurs the evolution of the **BenefitsCal Application Architecture and Innovation**. We provide the essential frameworks, accelerators, alliance partnership, and thought leadership. Details are in our Approach to Architecture Evolution and Innovation Strategy sections.

4.3.1 Strategy and Approach to BenefitsCal Application Architecture Evolution

5.2.3.3 Understanding and Approach to Application Evolution and Innovation

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.

Our guiding principles serve as the foundation for our approach to developing and maintaining BenefitsCal. These principles guide that our solutions are not only technologically advanced, but also aligned with the Consortium's strategic goals and operational needs. By adhering to these principles, we aim to deliver a robust, secure, and scalable BenefitsCal that drives innovation and efficiency. The principles in Figure 4.3-3 collectively guide our efforts to create a future-ready system that meets the evolving demands of the public users, CBOs, and Counties.



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Figure 4.3-3.Guiding Principles of BenefitsCal Architecture Evolution.



### 4.3.1.1 Our Proposed BenefitsCal App Evolution Approach

Our proposed strategy for evolving BenefitsCal's application architecture begins by defining a clear, goal-oriented **Future Vision Roadmap** with the Consortium and stakeholders. This plan outlines a **five-year vision** to accommodate optimization and scalability, reduce costs, bolster security, and support ongoing innovation. The Roadmap acts as a guiding **North Star** throughout the architectural transformation.

Once the vision is defined, we outline ways to achieve it via our established Collaboration Model processes. We then use the Annual Strategic Planning process to refine the five-year roadmap for new developments and program changes as required.

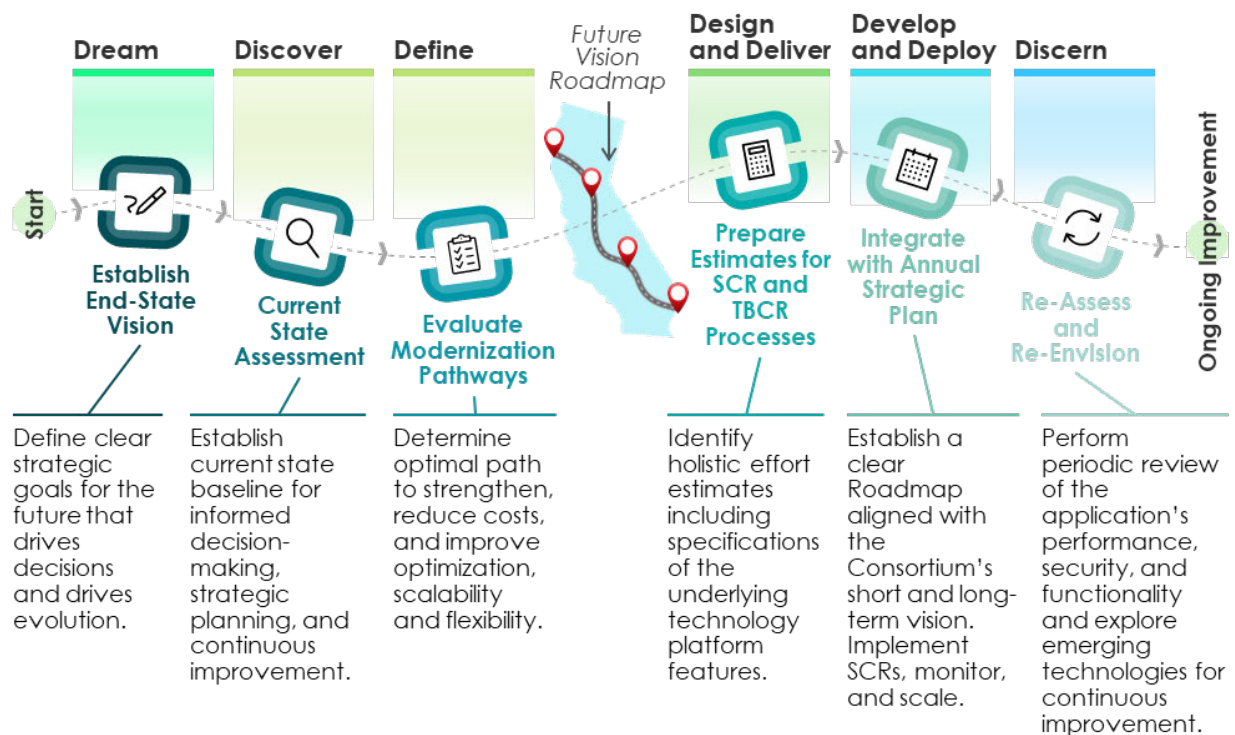
Figure 4.3-4 illustrates our strategic approach to architecture evolution and highlights key activities.

Figure 4.3-8, under “**Evaluate Evolution Pathways–Define**” in the next subsection, describes our approach to security concerns, reducing costs, and improving optimization and innovation in BenefitsCal.

#### DISTINGUISHING FACTORS

- Undisputed leader in the 2022 Gartner Public Cloud IT Transformation Services Magic Quadrant.
- Deloitte publishes Quarterly Tech Trends, which provides insights into the latest industry trends.
- Over the past 3+ years, we have developed an in-depth understanding of the BenefitsCal technical and stakeholder ecosystem. We have direct access to the SMEs and Architects who stood up the BenefitsCal system.





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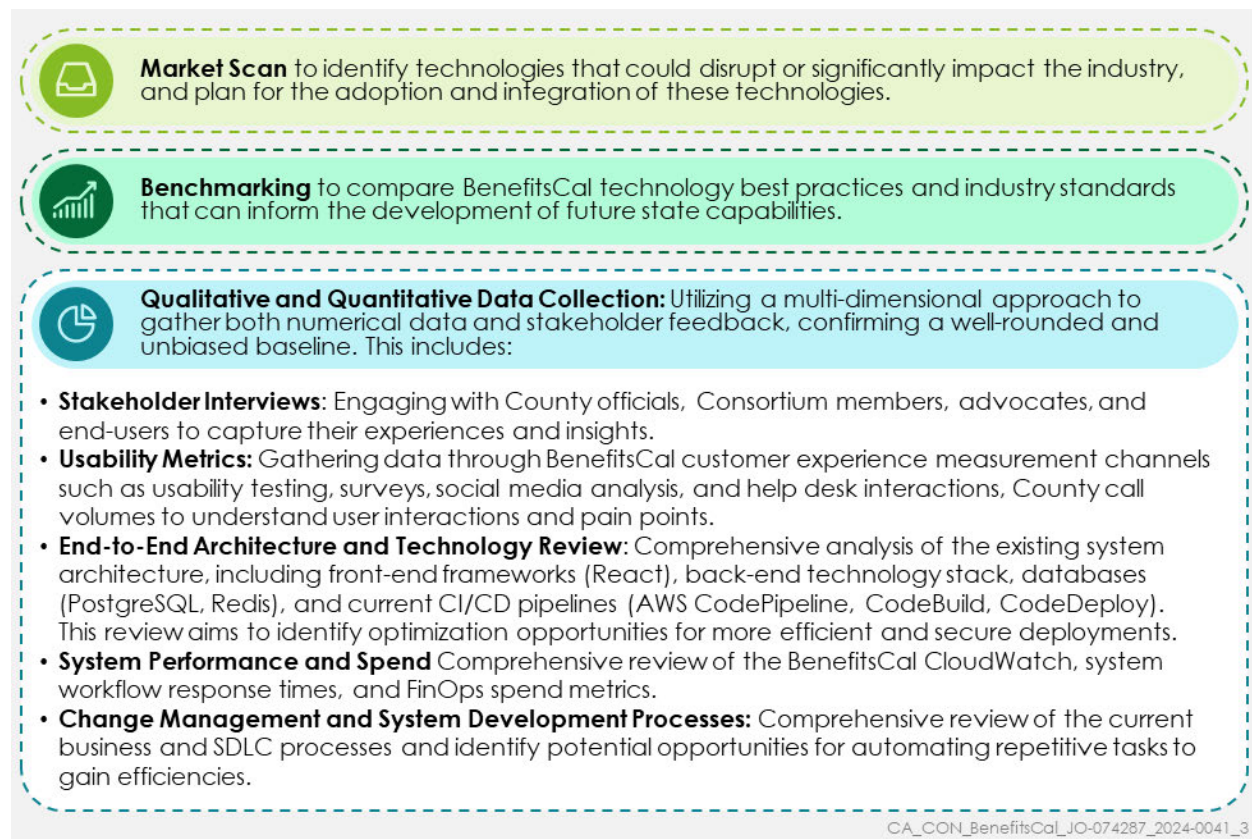
**Figure 4.3-4. Approach to BenefitsCal Architecture Evolution.**

## Establish End-State Vision—Dream!

Using the Consortium's overarching goals and vision for BenefitsCal's evolution, our initial approach focuses on establishing a Transformation Vision and identifying the capabilities needed to support it. This **Dream** phase explores and identifies future-state capabilities. We incorporate thought leadership from across the industry to align the transformation with BenefitsCal's aims. Deloitte works closely with Consortium stakeholders to establish a baseline for the target-state vision and confirm that the goals directly connect to the transformation's expected outcomes.

### Define Future-State Architecture Capabilities

We collect metrics and data from several channels during the Dream phase to identify future-state architecture capabilities, as Figure 4.3-5 shows.



**Figure 4.3-5. Data Collection Channels to Guide Future-State Architecture.**

An example of an envisioned capability could be AI-driven tools that enhance the development and testing processes. These tools analyze complex code patterns, suggest precise corrections, and enhance and expand automated testing coverage. We add recommended capabilities to the future vision prioritization list and review them with the Consortium during the visioning/ideation workshop.

Deloitte defines requirements for the identified priorities and determines critical success factors and relevant technical capabilities for each one. We use industry-leading expertise and proprietary tools to create robust architectures that align with the latest



industry standards and innovations. We identify and document the technology and systems required to deliver transformation capabilities. We also create initial future-state IT architecture and process flow maps.

### **Conduct Architecture Ideation/Visioning Workshop(s)**

Deloitte conducts facilitated workshop(s) for logical groupings of capability areas with CalSAWS stakeholders to review our initial blueprint. Current-state assessment data, CalSAWS governance processes, strategic goals, and target-state outcomes are used as key inputs for the ideation session(s). The workshops enable the Consortium stakeholders to make informed decisions on the criticality and prioritization of capabilities for delivery.

It is important to continually seek fresh ideas and innovation from the public and commercial sectors. Deloitte has conducted Idea Labs in various states to foster innovation—CalSAWS can leverage Idea Lab sessions to bring in BenefitsCal stakeholders to discuss and envision innovative ideas. Contributors include guest stars from other projects, technology innovators from state governments, and other eminent leaders from the HHS domain.

## **BENEFITS CAL SUCCESS STORY**

*Enhancing*  
**site usability and quick  
access to information for  
a better user experience**

In **2023**, the Consortium and Deloitte conducted research to improve the customer experience on BenefitsCal – in particular, usability on the homepage and helping users find information quickly on the site. As a result, several enhancements were made, including the introduction of a global search feature in **July 2023** and a redesigned announcement banner in **August 2023**. These improvements made it easier for users to find information and stay informed. Since BenefitsCal went live, **230,000** searches have been performed using the global search and 53 unique announcements have been posted on the website.



## Baseline Future-State Architecture

We incorporate feedback from the ideation workshops into architecture blueprint deliverables. The mapping between strategic goals, outcomes, and architecture capabilities is baselined and Objectives and Key Results (OKRs) defined. We review the final blueprint with governance bodies for final approval before the next phase.

### Dream Phase Outcomes:

- Baselined data and metrics for future-state capability prioritization
- Identification of key future-state capabilities
- OKRs defined for future-state capabilities
- Baselined Future-State Architecture Blueprint and documented application, data, security, and infrastructure needs

## DISTINGUISHING FACTORS



- The Deloitte AI Institute, founded in 2020, provides Consortium access to Deloitte's pioneering AI research and next-generation technology solutions.
- Dozens of AI projects with state and federal agencies demonstrate that we can manage and implement large-scale AI solutions.
- We offer you seven AI models for capacity planning, anomaly detection, batch job monitoring, abnormal behavior detection, capacity at risk detection, data quality, and incident management.



## Trustworthy AI

Security and privacy are essential to the use of AI in BenefitsCal operations. The Consortium can rely on Deloitte's Trustworthy AI (TAI) Risk Management Framework to facilitate both. Our TAI approach leverages a multidimensional AI framework to instill ethical safeguards across seven key dimensions: **transparency and explainability, fairness and impartiality, robustness and reliability, privacy respectfulness, safety and security, responsibility,** and **accountability**. This framework effectively manages AI's risks while maximizing its benefits.

### Current State Assessment–Discover

In **Discover**, we compare current-state metrics and workflows across various BenefitsCal components, including infrastructure, platform landscape, and user experience—all baselined in the previous phase against future-state OKRs. This comparison identifies discrepancies and areas of alignment, and determines next steps needed to reach the future state.

### Gap Analysis and Scoring

Deloitte reviews the data collected from the current-state assessment and the OKRs defined in the **Dream** phase. These insights inform the scoring criteria, which we use to score each capability area. For each criterion, we calculate the gap by subtracting the current-state score from the desired-state score. A larger gap indicates a greater disparity and potentially a higher priority for addressing that area.

Figure 4.3-7 illustrates scoring criteria that we can use for BenefitsCal. Deloitte reviews the criteria with the Consortium before final scoring.

### Scoring Model for Customer Satisfaction



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**Figure 4.3-7. Sample Customer Satisfaction Scoring Criteria Matrix.**

## Discover Phase Outcomes

The outcome of this phase is a comprehensive **BenefitsCal Current State Capability Assessment** and recommended prioritization. As part of this assessment, we document:

- System performance metrics and bottlenecks
- Security assessment results and recommended improvements
- Financial analysis detailing spending patterns and pitfalls
- Areas for improvement and potential opportunities
- Initial Prioritization Recommendation of capabilities based on quantitative and qualitative analysis

## Evaluate Evolution Pathways–Define

As the target state is baselined, modernizing or introducing something entirely new to the architecture may be necessary. Deloitte reviews the architecture blueprint and classifies each capability and application area into one of five **evolution pathways** as highlighted in Figure 4.3-8. Then we **Define** the next steps and plan to achieve the Future-State Vision.

Evolution pathways involve assessing the complexity and impact of changes on each capability area. We then plan and implement the necessary steps to achieve the Future-State Vision, with BenefitsCal continuing to meet users' evolving needs. To manage scope and execution, our team groups initiatives into logical enhancements. We document initiative descriptions, value metrics, and alignment with your goals. Capability classification also addresses change management, risk mitigation, security, technology stack requirements (new or updated), and associated costs.

### Reimagine

Application is performing to current expectations, but opportunities exist for future enhancements using AI/ML, automation or more data enabled architectures.

### Re-Platform

Application is important for delivering business value but is not scalable to support growth. Possible actions could include consolidation, upgrade or migration to a new or an existing platform.

### Retire

The application does not deliver significant business value. Depending on its business criticality and the feasibility of technology re-platforming, a retirement plan may be advisable.



### Retain

Application reflects good technical condition with potential for incremental improvement in business value delivered. Systematic enhancements should be planned.



### Re-Design

Application is in good technical condition but is contributing sub-par business value. Decide whether to enhance or redevelop for greater business value.



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**Figure 4.3-8. Evolution Pathway Categories for Capability Classification.**

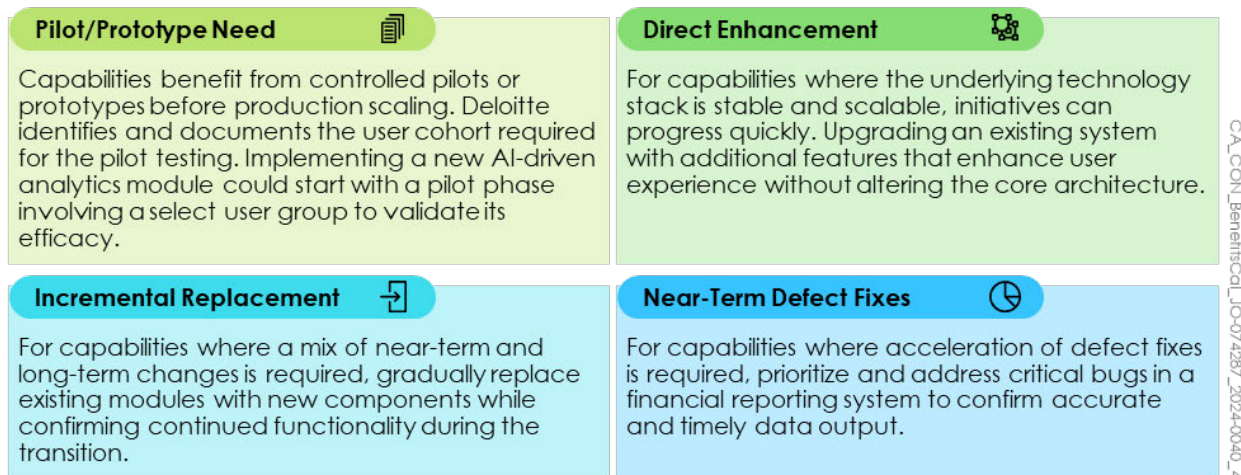


In some cases, a hybrid approach can balance innovation and practical application. To reimagine through innovation, we may use advanced AI/ML algorithms to enhance data processing and user interactions. This involves refactoring existing microservices to optimize performance and reduce latency. The process can provide deeper insights and predictive capabilities and offer new features using cloud-native services for improved scalability and resilience. **Using this approach with BenefitsCal**, Deloitte achieved a significant 65 percent reduction in AWS expenses by analyzing monthly service transaction volumes across different environments.

As cloud usage grows, managing costs becomes more complex due to unpredictable demand, sprawl across platforms, and complex pricing models. The Consortium could update financial operations management via a comprehensive **Cloud FinOps** solution using the “**Reimagine**” pathway. The pathway can help the Consortium to manage costs and maximize returns on cloud investments, while accessing tools to visualize, optimize, and control cloud expenditures—all on a large scale with minimal effort. Submitted to the Consortium for review, the pathway assessment can capture the impact and complexity of any initiative in detail.

### Conduct Evolution Pathway Analysis

Depending on the finalized pathway, each initiative is grouped and sequenced to support estimation and execution planning. As part of the pathways design, Deloitte makes recommendations, as Figure 4.3-9 illustrates.



**Figure 4.3-9. Pathways Recommendations.**



Deloitte's **CloudBilling 360™** Gen AI FinOps capability:

- Streamlines visualization, optimization, and control of cloud spending
- Provides insights and automates cost-saving actions
- Manages cloud expenses across AWS, Google Cloud, and Azure
- Simplifies multi-cloud reporting and identifies compliance issues

Once finalized, the pathways maximize innovation, security, cost efficiency, optimization, scalability, and flexibility and align with the Consortium's strategic aims.

**Develop Sequencing and Future Vision Roadmap**

Deloitte collaborates with the Consortium to create and sequence System Change Requests (SCRs) for the identified priorities to create **a Future Vision Roadmap**. This process helps align the modernization efforts with the overarching business goals and objectives. The idea is to enhance the user experience, reduce costs, and improve operational efficiency. We evaluate each SCR based on how it addresses these critical factors and verify that these strategic modernization efforts are impactful.

For example, we may find that the current database system slows response times. In that case, upgrading to a more efficient, scalable solution would make sense. The upgrade stands to improve both customer service and operational efficiency, so this initiative would rank high on our priority list. We would perform a cost-benefit analysis to confirm that the new system reduces operational costs and that a comprehensive migration plan can mitigate risks.

Table 4.3-2 presents a comprehensive analysis of the evaluation criteria used in our prioritization process. These criteria align with the Consortium's strategic goals and aims. This alignment aids in meeting the requirements outlined in UA5, focusing on **how** the approach addresses essential aspects such as security, cost efficiency, and improvements in optimization, scalability, and flexibility.

Evaluation Criteria	Criteria Description
Security	We evaluate the impact of each modernization effort on advancing BenefitsCal's Security Maturity, in alignment with applicable Consortium Security standards and vision as well as leading practices, such as the Cybersecurity and Infrastructure Security Agency (CISA) Zero Trust Maturity Model. Security modernization enhancements aim to improve operations, such as automated security practices, innovating in fraud prevention, securely integrating AI, and strengthening the system with robust and proactive controls.
Cost	We evaluate the impact of each modernization effort on key business metrics such as the ability to reduce operational and maintenance costs. For example, we could deploy predictive models to forecast workload patterns and automations to reduce over-allocation. Further, we could use AI-driven spend recommendations to inform financial decisions. These criteria influence roadmap evaluations, to improve financial transparency and support strategic budget adjustments. The evaluation emphasizes cost-saving initiatives and the advancement of financial management practices and weighs immediate implementation costs against long-term Return on Investment (ROI).
System Optimization	We use key business metrics to evaluate the impact of each modernization effort, with a focus on optimizing system performance and resource utilization. This involves assessing existing technical debt, confirming compatibility with current systems, and evaluating the availability of resources needed to implement the changes. We consider the technical



Evaluation Criteria	Criteria Description
	feasibility of the changes most likely to improve mission outcomes and overall system efficiency.
<b>Scalability and Flexibility</b>	We use key business metrics (e.g., the ability of the system to adapt and scale to changing requirements and user demands and facilitate long-term usability and flexibility) to evaluate the impact of each modernization effort. We consider the degree to which a technology change can scale with increased operations and adapt to future needs and confirm that investments remain relevant as client adoption grows and evolves.
<b>Risk</b>	We evaluate the end-to-end risk profile across operational risks, security risks, and compliance risks. We prioritize initiatives with potential risks we can manage or mitigate.
<b>Alignment with Strategic Goals</b>	We evaluate alignment with the Consortium's long-term strategic goals (e.g., digital transformation, customer experience enhancement, program and policy compliance, or County needs).

**Table 4.3-2. Evaluation Criteria for Capability Prioritization.**

We assign each SCR an Evolution Impact Score. By assessing progress across select dimensions, this rubric allows us to evaluate the impact of each modernization effort. The scores enable us to sequence the modernization initiatives and maximize their effectiveness and value to BenefitsCal. This scoring system helps us to determine which projects we should tackle first, based on potential benefits and alignment with the strategic vision.

### Define Phase Outcome

- Functional and Technical SCRs
- Finalized Future Vision Roadmap with sequenced priorities
- Future State Architecture Blueprint

### Prepare Estimates for SCR and TBCR Processes—Design and Deliver

In the **Design and Deliver** phase, we finalize the architecture blueprint, which forms the foundation for accurately and comprehensively preparing the SCR and Technology-Based Change Request (TBCR) estimates. This process involves a detailed and holistic assessment of effort estimates, as we confirm that every aspect of the project aligns with the finalized architecture. In doing so, we account for all project components and lay the groundwork for smooth execution and delivery.

Stakeholder input and review are integral to this process. By actively engaging stakeholders throughout the estimation phase, we gather critical insights and feedback that help refine the project scope and objectives. Through this collaborative approach, we verify that the estimates reflect the actual needs and expectations of all parties involved—which leads to more accurate and realistic projections. We create SCR and TBCR estimates via the BenefitsCal standard estimation process.

### Finalize Design for the Architecture Blueprint

We create a comprehensive blueprint for the proposed changes to the Future Vision Roadmap. This activity forms the foundation for the entire project, as we outline the

technical specifications and requirements that guide the implementation. Through our detailed architecture design, we meticulously craft components that reduce the likelihood of unexpected issues arising later on.

### Finalize SCR Estimates

We prepare detailed estimates for SCR and TBCR processes, to confirm successful project planning and execution. SCR estimates include one or more of the following efforts illustrated in Figure 4.3-10.

 <p><b>Design, Development &amp; Testing, and Implementation Efforts</b></p> <p>Detailed development, testing, and implementation efforts are included in the effort estimates, focusing on the priorities outlined in the Future Vision Roadmap.</p>	 <p><b>New Technology Needs, Pilot Tests, and Proof of Concept Efforts</b></p> <p>We evaluate new technologies and platforms through proofs of concept, particularly for re-imagined priorities. These tests in controlled environments are vital for assessing feasibility and effectiveness, helping us identify potential challenges and opportunities early on.</p>	 <p><b>Rewrite, Redesign, and Re-Platform Efforts</b></p> <p>Efforts encompass a detailed assessment of feature modifications, rewrites, redesigns, and replacements, evaluating the complexity and effort needed for each change. This includes analyzing impacts on existing systems and confirming smooth integration without disrupting operations. Additionally, the current technology platform is reviewed to understand its capabilities and limitations, along with any required upgrades.</p>	 <p><b>Change Management Efforts</b></p> <p>A clear and structured change management plan is created to keep all stakeholders informed about the progress, benefits, and changes introduced by the new architecture. For the SCRs that are impacting end users, trainings &amp; webinars, information flyers, fact sheets and/or job-aid needs are identified and included in the estimates.</p>
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**Figure 4.3-10. Effort Types We Consider for the SCR Estimation.**

### Design and Deliver Phase Outcome

- Finalized SCR and and/or TBCR estimates
- Finalized Architecture Blueprint for Future State

### Integrate with Annual Strategic Plan–Develop and Deploy

In the **Develop and Deploy** phase, we prioritize business and County user-impacting SCRs through the Stakeholder Collaboration Model, whereas we process technical SCRs via the CalSAWS Operations/Tech Change Approval Board (CAB).

Following approval, SCRs and Proofs of Concept (POCs) proceed through BenefitsCal's established SDLC, leveraging UCD methodology, as detailed in Section 4.2.

### Update System Design

We finalize and submit technical and functional detailed design specifications for stakeholder approval. Risks are assessed and mitigated, as applicable. Subsequently, we construct and rigorously test enhancements during System Integration Testing (SIT). Regression and County validations are completed, as applicable, and SCRs enter production. Concurrently, we activate the change management plan to confirm County readiness.



## Implement, Monitor, and Report

Pilot testing outcomes are evaluated to decide on a full-scale implementation, in collaboration with Consortium stakeholders. The effectiveness of implemented changes is assessed against the baseline OKRs in Production. Continuous monitoring is established, and metrics are systematically collected, analyzed, and shared with stakeholders per an agreed-upon cadence.

### Develop and Deploy Phase Outcomes:

- Completed Technical and Functional Design documents
- Scale and Risk Management Plan, as applicable
- Completed SCRs, Pilots, and POCs
- SCR post-production Metrics and Usage report

### Reassess and Re-Envision–Discern

This aligns to the **Discern** phase of software development. To confirm that BenefitsCal still is effective, adaptive, and aligned with evolving needs and technologies, a systematic approach to reassessment and re-envisioning of the Develop and Deploy phase is critical at a regular cadence.

**Reassess:** The reassessment involves a comprehensive analysis of the application's performance, security, and functionality. As illustrated in Figure 4.3-11, this includes gathering feedback from stakeholders, reviewing system metrics, and conducting detailed audits to understand how well the application meets its aims. This exercise is like the Current State Assessment process.

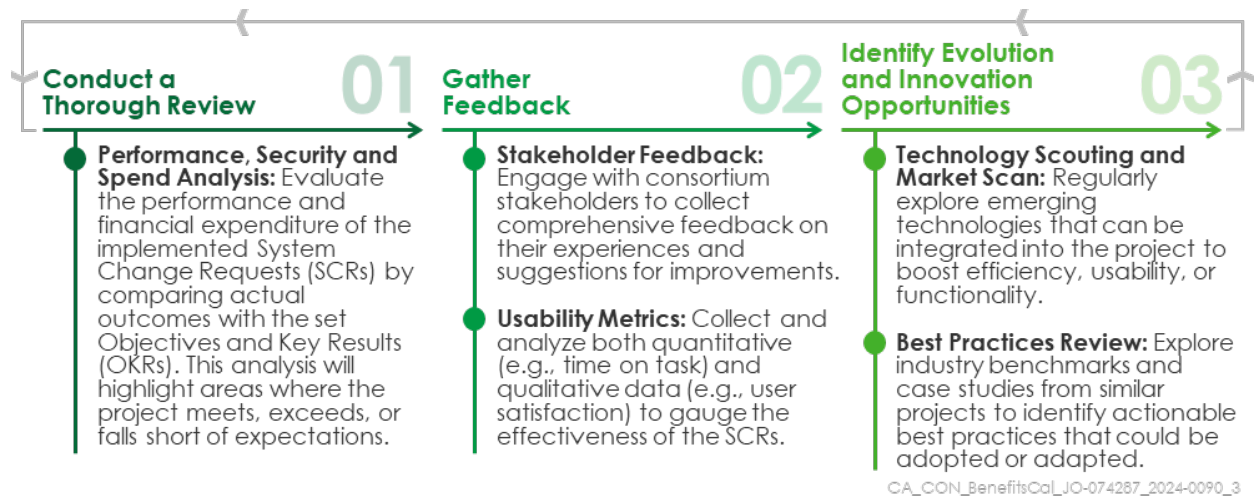
## BENEFITS CAL SUCCESS STORY

### Enabling easier configuration and application of Disaster CalFresh in BenefitsCal

With the initial go-live in **September 2021**, the Disaster CalFresh program was supported by a digital workflow as an alternate channel for customers to apply for disaster benefits using the BenefitsCal portal. In **2022**, the Consortium and Deloitte enhanced the BenefitsCal System Administrator dashboard to provide a better ability to manage disaster periods.

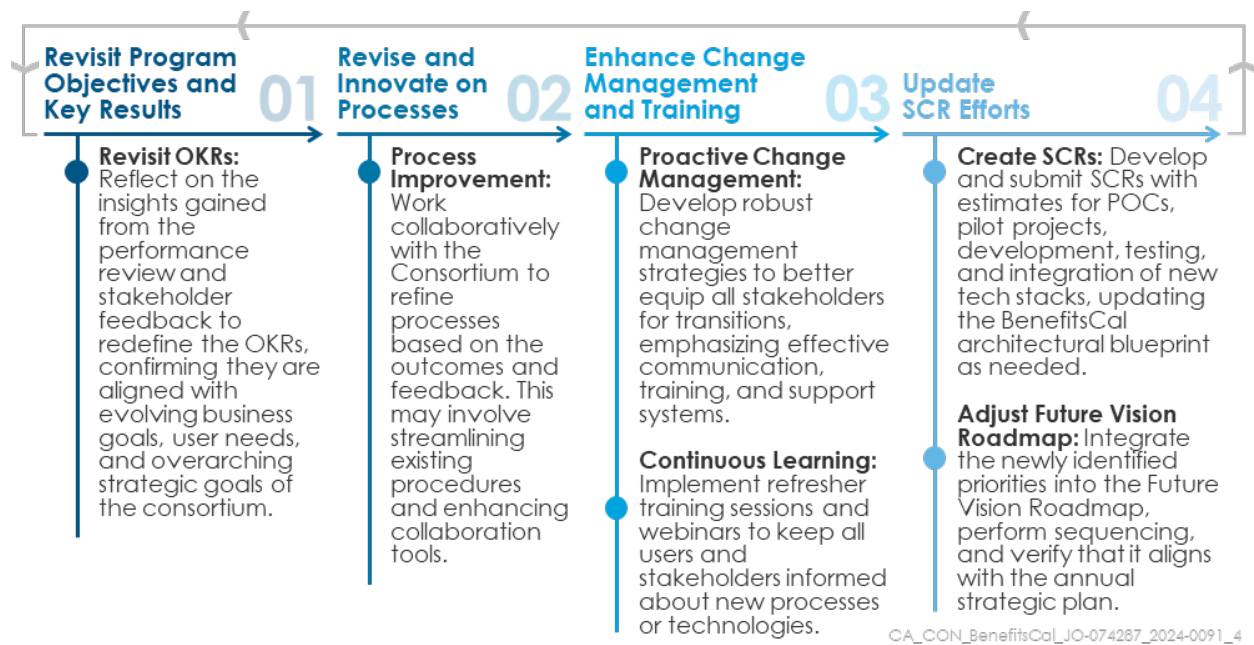
The changes enable the Administrator to configure disasters in BenefitsCal without coding updates by using it as an admin feature. This increased the application flexibility and minimized system dependencies, allowing the Administrator to configure disaster application intake using BenefitsCal.

This also included support for pre-registration to enable early application submissions as mandated by FNS. Since its inception, more than **8,167** disaster aid requests have been submitted across **18** California Counties, reducing the overall foot traffic to the County offices.



**Figure 4.3-11. Approach to Reassess.**

**Re-Envision:** For re-envisioning, we update BenefitsCal's strategic direction. This involves reviewing and adjusting goals based on the findings from the reassessment. This may affect what technologies and innovative solutions are explored. As shown in Figure 4.3-12, we also revisit the SCRs and adjust them as necessary to reflect the new vision.



**Figure 4.3-12 Approach to Re-Envision.**

### Discern Phase Outcomes

- Improvements and Strategic Recommendations clearly documented
- Updated OKRs and Architecture Blueprint
- Updated Effort Estimation
- Risk Assessment and Mitigation Plan
- Adjusted Future Vision Roadmap for Implementation



## 4.3.2 Proactively Exploring and Evaluating Technology Innovations

### 5.2.3.3 Understanding and Approach to Application Evolution and Innovation

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.

Our approach to technology innovation for the Consortium has four guiding principles, illustrated in Figure 4.3-13. These principles drive strategy, influence management of innovation activities, and inform resourcing needs and solution development.



**Co-creation is a must:** Use the expertise of Consortium, County staff, customers, CWDA, vendors, and subject matter experts within Deloitte to ideate, build, and pilot solutions. Co-creation brings together diverse voices that promote equity, flexibility, and adaptability within solutions to meet real stakeholder needs.



**Be flexible and adaptable:** Innovation solutions should consider County, Consortium, and Customer preferences, addressing when and how we might support Counties in adopting new innovations. Configurability in solution design is critical to meeting the varying business processes and needs of Counties.



**Innovation is not standalone:** Innovation cannot be done in a technology bubble. We think beyond just technology when it comes to innovation. We look at innovation for supporting structures and operations as that is also required to drive new value for the Consortium, Counties, and customers.



**Borrow ideas and learnings from a network of innovators:** Use our network of HHS clients and leaders, best and emerging practices from across states and industries, and Deloitte alliances and accelerators as a starting point for innovation solutions that can be tailored for the Consortium's needs.

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**Figure 4.3-13. Innovation Guiding Principles.**

### 4.3.2.1 Explore and Identify Innovations

Deloitte actively explores and evaluates innovations to enhance our client services and operations. We gather a wide array of ideas through scouting and user research. We then refine these ideas in collaboration with key stakeholders and Consortium staff and use our evaluation methodologies to shape a **Future State Vision**. As innovation solutions are selected for development into POCs and piloted, we monitor their performance to identify which ones we should scale to accommodate CalSAWS and BenefitsCal technology, end users, and County business processes. Based on value, our innovation process starts broad and then narrows. Throughout this process, illustrated in Figure 4.3-14, we set up feedback loops to rapidly iterate and enhance innovation solutions.

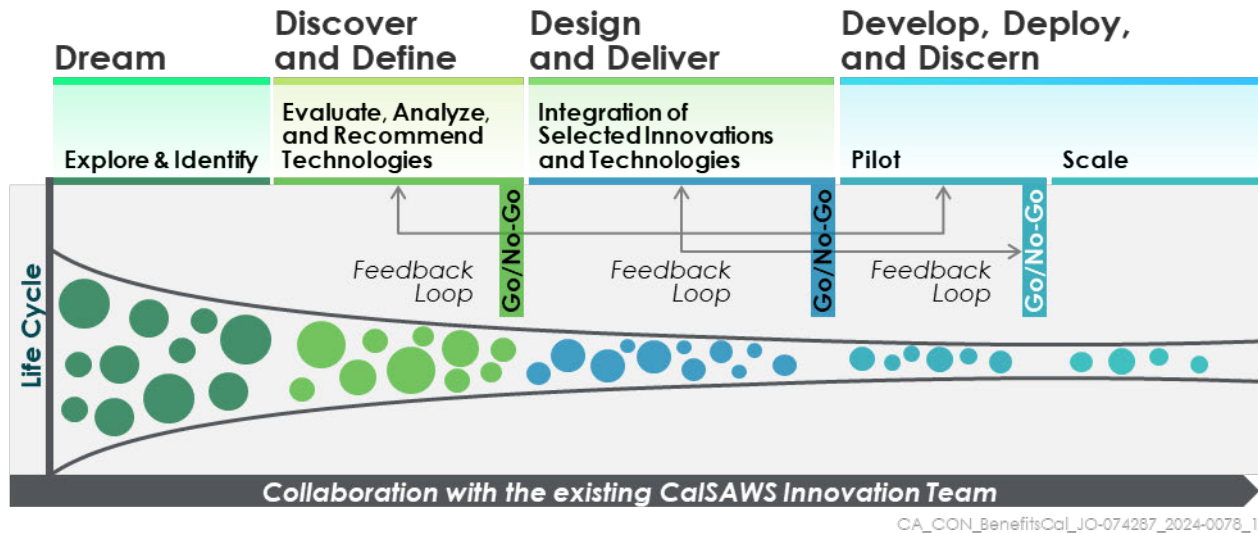


Figure 4.3-14. Our Innovation Process.

### Continuous Tech Scouting and Sensing

Deloitte is a leader in identifying trends in technology and innovation. We have created **Innovation and Technology Centers** and our **HHS Nerve Center**, which use our cumulative expertise to push the limits of our ideas, drive insights, and identify innovations useful to our clients. We can tap into a wide range of perspectives, knowledge, and insight focused on specific industries. We can also identify opportunities and cases for the adoption of emerging technologies. Deloitte uses accelerators and engages our industry and state clients to source modern solutions. Given our knowledge of HHS, California, and BenefitsCal, our team brings ideas that we know can work for you on Day One.

We help the Consortium prioritize which technologies and trends call for the use of often-limited resources. As we continue to gather new ideas and expand our list of solutions of value to the Consortium, we look internally to identify how best to take advantage of these solutions. We draw on our team

**Gathering User Input**

The following listening and sensing channels are already configured to collect data on BenefitsCal:

- **Always-on surveys:** Enable continuous user feedback to inform and drive future innovations
- **Intercept surveys:** Capture user feedback at various stages of interaction with the platform
- **Amplitude:** Maps user journeys and monitor real user interactions to pinpoint user experience challenges
- **Monitor business metrics:** Identify areas for usability enhancement

**Future Channels**

- **Stakeholder idea channel:** Develop and configure an idea channel (e.g., survey) for stakeholders to share their ideas on system and business process improvements
- **Hackathons:** Create a unique environment for participants to work together to solve a specified problem in an environment that promotes creativity and collaboration
- **Workshops:** Bring participants together, in-person, to identify pressing problems and make recommendations on innovative solutions.
- **Idea Labs:** Facilitate Idea Labs to spur innovation; Participants include guest experts and tech innovators from other projects and technology innovators within state.



expertise and that of Consortium, County, and CWDA staff. We use collaborative ideation activities such as workshops, hackathons, and crowdsourcing to select the solutions and ideas worth developing.

### User Research and User-Centered Design

Deloitte's innovation services are grounded in **UCD, which emphasizes the need to bring diverse perspectives** and ideas into BenefitsCal from California's HHS ecosystem and those of other states. UCD puts stakeholders (in California's case, workers and customers) at the center of a solution and considers their complex behaviors and needs. By understanding users' desires and motivations, we identify unmet needs and create innovative solutions to address them.

### Innovation Partnerships and Accelerators

Deloitte is always on the lookout for solution providers (ranging from startups to big tech firms) who can bring innovative solutions to our clients. Our many innovation partnerships and accelerators enable you to learn about emerging trends relevant to your needs (e.g., cloud, process automation, ML, gamification), and save time and money. We expand your innovation options by:

- **Leveraging our longstanding relationships with former HHS leaders** (e.g., past Medicaid directors, legislators, and policymakers) and former agency decision-makers so you can better forecast the HHS landscape and invest in innovation accelerators more likely to achieve adoption and support
- **Establishing partnerships with technology incubators and research firms** throughout the innovation ecosystem to pilot new solutions relevant to your landscape and expose you to new thinking and/or use cases relevant to your mission
- **Establishing physical sensing hubs in key locations** (e.g., Silicon Valley, Austin, Boston, New York, and Washington, D.C.). These hubs are staffed by Deloitte specialists who frequently meet with companies in these critical ecosystems and conduct deep-market analysis.

#### Deloitte Alliance Partners

We bring alliances and partnerships with over 110 companies to support our clients. The Consortium benefits by having better access to qualified staff and solutions to meet its innovation and technology needs.



### 4.3.2.2 Evaluate, Analyze, and Recommend Technologies

We perform detailed product assessments and use our technology alliances to gain knowledge and considerations of value to the Consortium. Our assessments balance risks, County needs, usability preferences, technical feasibility, policy, cost, and operational needs. We do this while we scout modern technologies and assess user

needs through a variety of listening channels and user-centered research activities (noted on the previous page). We consolidate our findings and report recommendations with which to move forward. These reports are delivered to the Innovation Team to drive collaboration with the Consortium and allow thoughtful reflection on the best emerging technologies that should move from idea to concept. We consider each concept's ability to resolve County and end user pain points and/or improve program efficiencies.

### Comprehensive Alliances to Support Innovation

We have extensive alliances—with 123 companies—within the vendor community, including leading platform vendors such as **ServiceNow**; leading content management platform vendors such as **Adobe**; cloud vendors such as **AWS**, **Google**, and **Microsoft**; and an expansive ecosystem of specialized best-of-breed vendors.

Our strategic technology partnerships are extremely valuable as we help you to reach the outcomes we collaboratively seek.

#### 4.3.2.3 Coordinating with the Consortium to Evaluate Technologies

Bringing together diverse perspectives is essential for sustained innovation in California, where each County has unique needs. The Consortium's Innovation Team plays a key role in integrating these varied viewpoints, including those of customers, County staff, and Consortium personnel. We gather feedback through various channels, such as surveys, demonstrations, the Collaboration Model, webinars, and technology showcases from other states.

We also collaborate with CalSAWS vendors, County Operations, and Infrastructure and Security teams to assess the cross-platform impacts of proposed BenefitsCal innovations aligning to our approach (outlined in Section 4.1- Integrated Multi-Vendor Environment). For example, integrating AI and ML automation in incident management can speed up ticket resolution, enhance customer satisfaction, and improve overall efficiency. Deloitte conducts impact assessment sessions with stakeholders, such

## BENEFITSCAL SUCCESS STORY

### Increasing customer satisfaction and support with Two-Way Messaging (TWM) feature

BenefitsCal was designed to allow County caseworkers to send a communication to customers, but it lacked communication in the opposite direction. This especially impacted customers who had ongoing questions about their cases. In **July 2022**, the Consortium and Deloitte implemented a secure two-way messaging feature between customers and County caseworkers. This allowed customers to receive the latest updates, ask questions, and take action on their cases directly through the BenefitsCal portal.

The feature improved the customer experience, reduced case processing delays, and enabled quicker access to benefits. As of **March 2024**, over **318,648** messages have been sent by customers to their caseworkers, and over **337,857** messages have been received by customers across **22** participating counties.





as the Help Desk and County Operations, considering application architecture, infrastructure, business processes, and security to select appropriate technologies and processes. We coordinate technology demonstrations through our alliances and software vendor contacts, which helps the Consortium to make well-informed decisions on innovation investments.

#### 4.3.2.4 Integration of Selected Innovations and Technologies into BenefitsCal

Our approach to integrating innovation includes three key steps: 1) conducting a business and technology impact assessment, 2) developing a solution POC, and 3) identifying funding strategies for scaling the innovation. They are explained below:





##### Step 1: Business and Technology Impact Assessment

We conduct business and technology impact assessments to further articulate the use case and innovation concepts we plan to use in collaboration with the Consortium. This assessment includes analyzing the software, hardware, and platform needs to bring the innovation concept to life. Our evaluations focus on functional and non-functional criteria across multiple assessment categories. The criteria are prioritized and weighted for accurate comparison and assessment of the current state versus future expectations. The details of each evaluation component are documented in an Innovation Assessment Report that we review with Consortium stakeholders.

[REDACTED]

[REDACTED]

The Innovation Assessment is based on the steps in Table 4.3-3.

Innovation Assessment Steps	
	<b>Identify Scope.</b> We confirm the scope of the innovation with the Consortium Innovation Team staff and other appropriate BenefitsCal stakeholders. The scope determines the domains that are analyzed (e.g., middleware, security, Infrastructure, applications, and databases). Focusing on key scope areas enables targeted analysis by the team and helps conclude the assessment in line with stakeholder expectations.
	<b>Confirm Requirements.</b> We conduct requirements sessions to confirm and document the innovation's technical and business requirements. For example, technical requirements for a new technology cover compatibility with other integrated software, browser compatibility and tech support, and the business requirements address the functional impact on BenefitsCal users. Functional impacts may be business-specific, such as a higher benefit adoption rate or better outreach to individuals resulting from a typical mobile platform solution.
	<b>Identify High-Level Dependencies.</b> We identify the systems that the innovation or technology may impact. Our team uses the As-Is BenefitsCal system architecture model, system inventory list, and tools to identify dependencies of various CalSAWS software and systems relevant to the change. This helps identify the system owners/stakeholders to consult during the detailed analysis. Also, we visualize the to-be architecture by integrating the new solution/product in the architectural landscape—this helps the architects to get a holistic view of the change.
	<b>Comprehensive and Detailed Assessment.</b> Once impacted systems/modules are identified, we work with the respective owners to complete a detailed analysis of impacts to each system. We evaluate impacts (e.g., screen changes, integrations, trainings, deployments/installations, and configuration changes) as part of this effort and document assumptions related to the assessment in the final report.

**Table 4.3-3. Innovation Assessment Steps.**

We offer a standardized assessment framework and template to confirm consistency in the technology and business assessment process. This template includes designated sections for documenting impacts on crucial aspects such as design, configurations/coding, testing, deployments, and training. We work closely with Consortium stakeholders to refine the template and finalize the key elements of the Innovation Assessment framework. Our team updates the Future Vision Roadmap to reflect future-state capabilities and integrate them into the annual strategic plan.

**Step 2: Solution Development and Proofs of Concept**

Deloitte collaborates with the Consortium to transform promising technology solutions into validated POCs through a structured Agile and design-based process. This includes refining business requirements, creating mock-ups, and validating concepts with feedback from key stakeholders and users. Each concept undergoes a testing and refinement phase involving Consortium and County staff to confirm compliance with necessary policy, legal, and technical requirements. After revising the concepts, Consortium stakeholders make a go/no-go decision regarding further funding for pilot projects and potential scaling within the BenefitsCal technology architecture.



### Step 3: Identify Innovation Funding Strategies

Deloitte has a strong record of assisting state agencies in securing additional federal funding. This can enable a client, such as the Consortium, to allocate state funds to other priorities. We help clients access federal grants, such as the SNAP Process and Technology Improvement Grant (PTIG) by developing and submitting robust business cases. We specialize in conducting cost-allocation scenarios to maximize funding efficiency, such as leveraging Medicaid 90/10 funding where applicable. This expertise enables states to optimize their funding streams and foster innovation in their operations.

#### 4.3.2.5 Evaluating Value and Impact to Business Operations

A structured approach is needed for piloting and scaling innovations, especially as more organizations pivot toward data-driven decision-making. A structured, data-driven approach is particularly important for California, with its 58 diverse Counties. Flexibility is needed in concept development and scaling since a generic approach may not all across the County staff and customer base. For this reason, we work with the Consortium to identify the scale of the pilot needed, factoring in the innovation or technology being evaluated. We align this process with our established SDLC on BenefitsCal.

Bringing concepts to scale requires collaboration throughout the innovation process. This process is iterative by nature and should involve stakeholders who weigh in on concept design early on. There are many feedback loops throughout the innovation process, as depicted in Figure 4.3-14. Innovation Process in **Section 4.3.2.1 Explore and Identify Innovations**. We use these user feedback loops during ideation, concept development, and piloting.

### Robotic Process Automation (RPA)

## Return Mail Auto Indexing

In **2021**, Deloitte worked with the State of Florida to develop and implement a bot to read and decipher the contents of returned HHS notices that are scanned into the ACCESSS Florida System Document Imaging System.

These notices are automatically index them using iOCR and RPA technologies. This significantly reduced manual work so workers could focus on other priority tasks. The solution automates indexing for over a million documents yearly.



## Piloting Innovations

When piloting innovations, we identify the appropriate test and control groups to demonstrate the impact of a concept on operations. Our in-depth understanding of the BenefitsCal landscape enables to advise the Consortium on the best pilot and control locations. Our team design concepts for piloting in a flexible manner so Counties can choose which pilots they move forward and how we can tailor concepts to better meet their staff and/or customer needs. The Consortium has 58 Counties, and a degree of flexibility must exist in solution and pilot design to allow for scale.

## Scaling Innovation

After a pilot's completion, the next step is to scale the innovation to more Counties and/or customers. We streamline this process into a repeatable model, outlined in a detailed deployment/data collection plan. Each pilot's unique design elements are carefully documented. Our Future Vision Roadmap guides this expansion, specifying key timeframes, milestones, and dependencies, to minimize operational disruptions and align with other critical business priorities.

## Metrics and Reporting

Effective measurement is key to sustainable innovation. We collaborate with the Consortium to evaluate the impact of projects, monitor feature status, and assess the health of the innovation pipeline. We also foster support for ongoing innovation initiatives by evaluating against the OKRs defined for the innovation. As BenefitsCal expands and diversifies its customer insight channels, adopting advanced technologies for managing and interpreting these insights is crucial. We collaborate with stakeholders to define strategic objectives for Data and Reporting, with our recommendations set to include:

- **Optimization of CX Reporting:** We enhance the customer experience reporting by transforming existing reports into a real-time, interactive platform that increases transparency and responsiveness for stakeholders.
- **Advanced Data Mining Using AI Technologies:** We use AI to intensify data mining across BenefitsCal and CalSAWS, extracting valuable insights from various data sources such as help desk and County calls.
- **Predictive Insights to Enhance Customer Experience:** We explore AI models to produce predictive insights from existing data, offering proactive tools to anticipate user needs and suggest system improvements.



### Feature Management

Deloitte works with **unleash**, a product/tool that allows us to develop the ability to hyper-target pilot groups, reduce risk by testing new features and gathering user input early, and effectively measure pilot and control population performance. The ability to manage feature performance and access through piloting reduces stress, increases success, and sets the stage for tailored scaling.



### 4.3.3 Participating with and Supporting the CalSAWS Innovation Team

#### 5.2.3.3 Understanding and Approach to Application Evolution and Innovation

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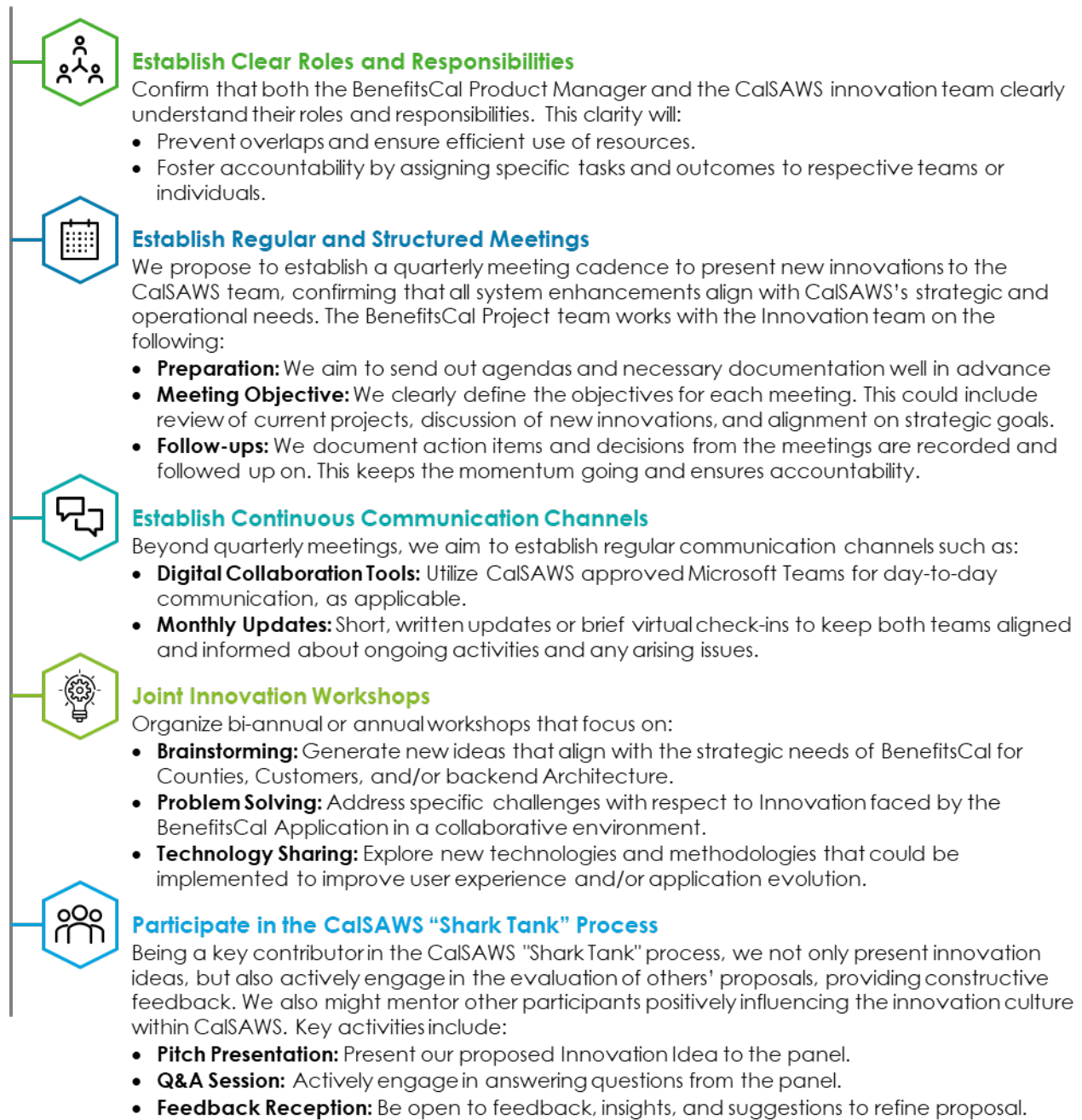
Describe how you will participate with and support the existing CalSAWS Innovation Team relative to your overall Innovation strategy.

Our approach integrates the CalSAWS Innovation Team into the BenefitsCal development process. This collaboration improves the functionality and user experience of the BenefitsCal system and aligns it with the broader goals of the CalSAWS projects. We acknowledge the Consortium's adoption of a quarterly **Shark Tank** process, whereby stakeholders present innovative ideas, advancing promising concepts to Proof of Concept or Pilot phases. Emphasizing UCD to drive innovation, Deloitte has refined this model since its debut at APHSA ISM in 2012.

Our proposed Innovation Strategy uses the expertise of the CalSAWS Innovation Team as a key advisory resource, confirming that updates to the BenefitsCal system are consistent with the broader objectives of the CalSAWS applications. We envision the CalSAWS Innovation Team comprising "Innovation Champions" representing key CalSAWS stakeholder groups. In collaboration with the Consortium and the CalSAWS Innovation Team for BenefitsCal innovation objectives, we propose integrating the CalSAWS Innovation Team into the feedback loops throughout the BenefitsCal Innovation Process. This integration will facilitate their participation in ideation workshops, technology evaluations, and recommendations, as well as during demonstrations and reviews following proofs of concept (POCs) and pilot programs. This collaboration between the BenefitsCal project team and the CalSAWS Innovation Team brings the following value:

- Connects innovation efforts to organizational-level goals and objectives
- Facilitates stakeholder and technology connections across projects and systems because it is not tied to one division or function
- Provides innovation expertise and culture building for the HHS agency
- Develops an approach focused on integrating a diversity of perspectives by bringing together SMEs and stakeholders
- Facilitates decision-making for innovative ideas and gains buy-in for piloting/scaling through focused stakeholder and leadership engagement efforts

To maintain strategic alignment and facilitate smooth operations, the BenefitsCal Product Manager keeps a close and continuous relationship with the CalSAWS Innovation Team throughout the contract. We work with the Consortium and the CalSAWS Innovation Team, as Illustrated in Figure 4.3-16, to:

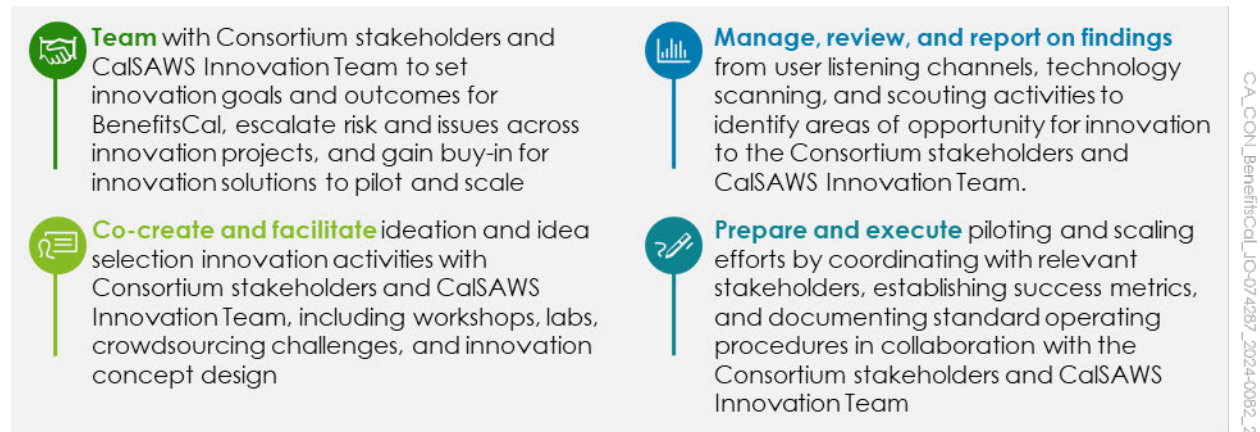


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**Figure 4.3-16. Participating with and Supporting the CalSAWS Innovation Team.**

Figure 4.3-16 summarizes proposed key responsibilities of the BenefitsCal project team while collaborating with the Innovation Team. These are validated with the Consortium and the Innovation Team during transition-in along with an overall review of CalSAWS innovation processes. As illustrated in Figure 4.3-17, we work with the Innovation Team to review and finalize its Key Responsibilities with respect to BenefitsCal Innovation objectives.





**Figure 4.3-17. Examples of Key Responsibilities.**

In conclusion, Deloitte is committed to bringing the right team, the right experience, and the right approach to help CalSAWS move BenefitsCal into the future and accomplish your ambitious goals sooner rather than much later. CalSAWS has always been a leader in innovation and an early adopter of transformational ideas—**let's stick together and keep leading the way.**

## 4.4 User Experience, Marketing and Public Communications

### 5.2.3.4 Understanding and Approach to User Experience, Marketing and Public Communications

Human-centric marketing and communications are crucial for public systems such as BenefitsCal. With individual's often relying on social media for information, misinformation can be a breeding ground. It is not enough to build excellent programs and solutions; the public must be informed about them and encouraged to use them through channels that resonate and drive interaction. They must have confidence in them to provide accurate information and be reliable for when the public needs vital services such as food, health care and cash assistance. It is especially essential for individuals needing access to services during a disaster or based on an emergent or immediate need. An approach that considers these circumstances and more results in improved effectiveness of the services through clearer, more responsive interactions, which lead to increased engagement, positive perception, adoption, and better utilization of services across the state.

As BenefitsCal navigates the evolving landscape of public services, it faces the challenge of increasing visibility and outreach to effectively engage with the public, Counties, State Partners, CWDA, labor organizations, interfacing partners, advocates, and community-based organizations (CBOs). Even with the availability of critical self-serve options, there is a need to promote these services and enhance public awareness to improve system perception and adoption. Unlike the 'Field of Dreams,' we cannot just 'build it and they will come.' BenefitsCal is set to expand and implement a comprehensive marketing and public communications program tailored to the diverse needs of its stakeholders. This initiative will guide outreach efforts, shape public opinion, and enable Californians to fully utilize available resources, significantly enhancing BenefitsCal's mission fulfillment.

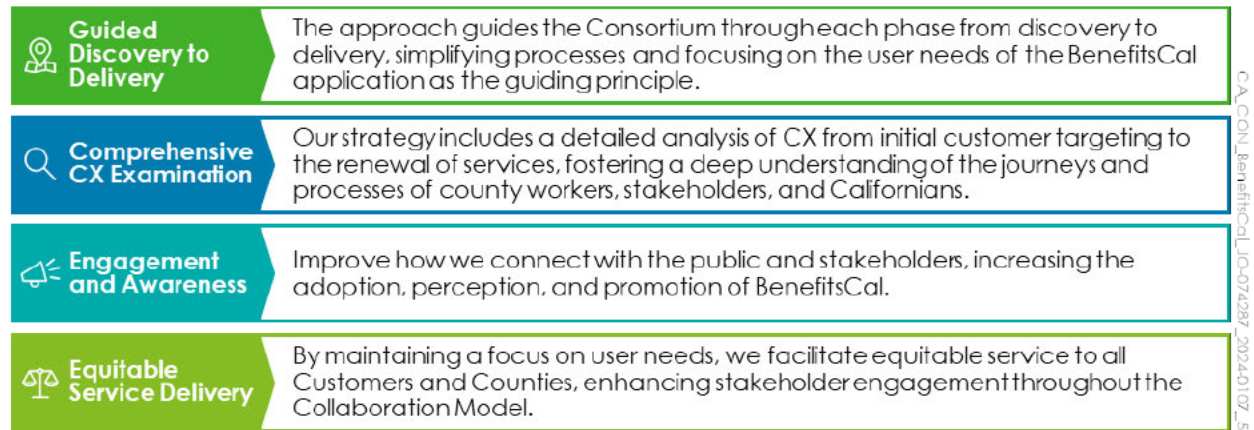
In collaboration with the CalSAWS Consortium, we integrate User-Centered Design (UCD) principles from Section 4.2 - Software Development with marketing and stakeholder engagement strategies (outlined in Section 4.4.2) to enhance BenefitsCal adoption and awareness. This strategy aims to optimize the Customer Experience (CX) and shape narratives, focusing on straightforward, user-focused processes that prioritize the needs of Californians, CBOs, and Counties. Figure 4.4-1 illustrates the key values of our approach, promoting increased engagement and transparency with BenefitsCal Customers and stakeholders.

#### SECTION HIGHLIGHTS



- Enhance customer outreach and marketing in collaboration with users, Counties, stakeholders, and CBOs to enhance BenefitsCal and drive adoption
- Engage county workers and stakeholders via 1:1 interviews, focus groups, shadowing, and site visits to gain insights and understand county processes
- Award-winning marketing and design capabilities target Californians on the right channels at the right time to encourage adoption and influence public opinion





**Figure 4.4-1. Key values of Our Customer Experience approach to BenefitsCal.**

Integrating UCD with our public communications and marketing strategies is crucial. Our approach uses iterative discovery and design to enhance user experiences, optimize County touchpoints for better customer understanding, and expand communication channels for public interaction and stakeholder engagement. By combining these elements, we promote equitable inclusion by understanding the ethnographic processes of strategic customer groups, creating a cohesive framework that addresses the diverse needs of stakeholders, Counties, State Partners, labor organizations, CBOs, advocates, and eligible Californians.

## Understanding and Key Considerations

Our team has spent over four years collaboratively improving BenefitsCal with diverse stakeholders including Consortium members, County users, labor and student organizations, State Partners, CWDA, Customers, and advocacy groups. This partnership has allowed us to continuously adapt BenefitsCal to meet the evolving needs of each group, enhancing service access and delivery. As we position BenefitsCal as the preferred access channel through heightened awareness and improved perceptions, the critical factors for success are outlined in Table 4.4-1.

Success Factors	Impact of Our UX, Marketing and Public Communications Approach
<b>Emphasizing Voices from the Field, CBOs and the Customer</b>	Recognizing BenefitsCal as the 'face' of the self-service eligibility process, it's crucial to understand and design for the comprehensive experiences of Customers, Counties, and CBOs. Recently, to address concerns about spam, CalSAWS branded its text messages as BenefitsCal to leverage its brand recognition. During the CalWIN migration, our team supported Counties on-site, gaining insights into how BenefitsCal integrates into service delivery. Site visits with Counties and CBOs are essential for observing real-time user interactions, such as Customers in County lobbies or submitting documents. As researchers and designers, we are committed to amplifying the voices of all stakeholders across the state, including less vocal groups. Continuous, targeted engagement with diverse segments—those familiar with technology, needing assistive support, preferring native languages, involved in higher education, or residing in rural areas—is vital to fully represent our diverse user base.

Success Factors	Impact of Our UX, Marketing and Public Communications Approach
<b>Enhancing Awareness through Continuous Training Engagements</b>	The BenefitsCal project team has been actively enhancing stakeholder engagement and support through various training initiatives. During the CalWIN migration, they conducted 18 webinars for county staff and six sessions for Community-Based Organizations (CBOs) across both migrating and non-migrating counties. These timely trainings were tailored to provide essential knowledge for a smooth transition and enhanced support capabilities. Additionally, the team held specialized webinars on case-link verification via email and phone, further involving county staff and CBOs in the system's continuous development.
<b>Ongoing State Partner Support to Compensate Research Participation</b>	We know that everyone's time is important and that taking away any time to provide us insight into their journey needs to be valued. As with the current BenefitsCal contract it is crucial, that research participation activities for Customers continue to be funded to incentivize engagement.
<b>Clearly Defined Metrics and Aspiration Targets</b>	Defining success metrics for new BenefitsCal features and marketing campaigns, as detailed in Section 4.2 (Dream, Discover & Define), is crucial. By engaging all stakeholders and aligning on aspirational targets, we confirm that every decision is contributing effectively towards a shared goal.
<b>Operationalizing Metrics Evaluation and Continuous Improvement</b>	Developing and defining OKRs offers a benchmark for assessing application awareness and drives adoption by aligning improvements with strategic goals. Regular updates to these metrics help keep our strategies effective and adaptable to changing environments.
<b>Amplifying Messaging and Expanding Engagement through Brand Ambassadors</b>	To shift our communication to be increasingly proactive and enhance collaboration, we need to engage stakeholders effectively, both as decision-makers and brand ambassadors for BenefitsCal. Expanding our partner network to include non-profits and using trusted relationships will amplify our messages. Prioritizing user experience improvements, we'll expand our materials library and use more effective channels to engage users. Sharing impactful metrics will boost awareness, adoption, and perception of BenefitsCal.
<b>Evolving the Collaboration Model</b>	By evolving the Collaboration Model to jointly create annual aspirations based on strategic priorities, we can focus on transformative goals. Initially, the model aimed to establish a north star from these priorities. Regularly referencing these priorities throughout the year will integrate a mission-focused approach into our activities, enhancing BenefitsCal's perception, awareness, and adoption.

**Table 4.4-1. Success Factors to Increase BenefitsCal Awareness, Perception and Ultimate Adoption.**

To boost county process integration, awareness, adoption and perception of BenefitsCal, Deloitte enhances stakeholder engagement and marketing efforts by leveraging a deep understanding of stakeholder and customer needs, aspirations, and challenges to develop meaningful insights, strategies, and tactics. We focus on integrating CalSAWS enterprise stakeholders at every step in our engagement process to develop strategic, engaging, and actionable marketing and communications



materials as well as BenefitsCal experiences that create connections and trust with Customers, Counties and CBOs.

Through a combination of hands-on experience with BenefitsCal, leading technologies and capabilities (see Figure 4.4-2 below), actionable data insights, and award-winning experience, Deloitte advances how BenefitsCal currently engages and communicates with its audiences. We do this in a way that is honest and practical to build trust and influence behavior with public and stakeholder groups to strategically align communication, marketing, and program initiatives to increase awareness, perception, and drive higher usage of BenefitsCal. Ultimately this leads to less time spent in an office or on the phone, fewer reapplications stemming from benefit churn, an elevated sense of independence and increased confidence.



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**Figure 4.4-2. Deloitte Digital's Capabilities and Tools.**

### How the remainder of the section is organized

- 4.4.1 Enhancing Integration of BenefitsCal and County Processes (UA.8)
- 4.4.2 Approach to Public Communications and Marketing (UA.9)
- 4.4.3 Approach to Engaging the Stakeholder Community (UA.10)

## 4.4.1 Enhancing Integration of BenefitsCal and County Processes (UA.8)

### 5.2.3.4 Understanding and Approach to User Experience, Marketing and Public Communications

#### 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.

California's 58 counties play a crucial role in providing essential services to residents. Each County has unique processes to meet these needs, yet they all aim to connect Californians with necessary services when they need it. To better integrate BenefitsCal with county operations, it is vital to align with the Consortium, stakeholders, and both CalSAWS M&E and Infrastructure Contractors through a deeper understanding of each county's business processes. For instance, recent collaborations have streamlined the

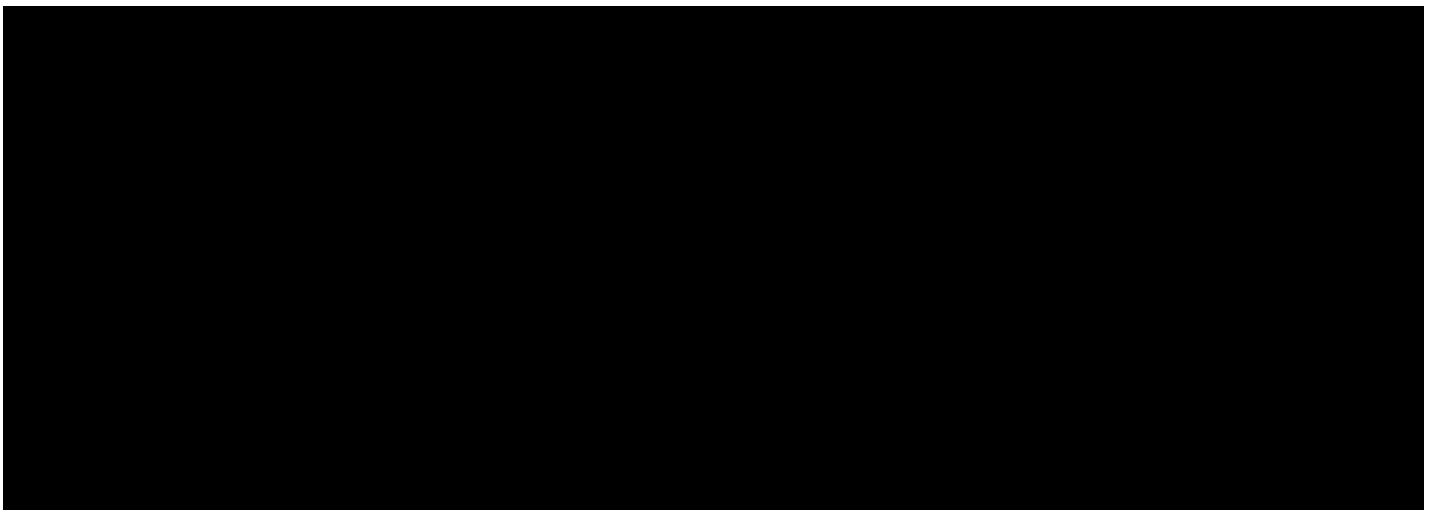
integration of end-to-end business processes for replacing CalFresh benefits and handling EBT card theft or fraud.

BenefitsCal maintains a unified customer experience while allowing counties the flexibility to adapt to their business processes. New BenefitsCal features can introduce service access channels previously unsupported by counties, potentially increasing calls or visits to county centers due to miscommunication. Limited county staff awareness of how BenefitsCal supports their processes can lead to longer call times. Our User-Centered Design approach focuses on thoroughly understanding county processes to address the right issues and enhance integration with existing and future BenefitsCal features.

Over the past three years, counties have increasingly adopted BenefitsCal with some counties placing strong emphasis on it as an access channel to foster engagement and reduce workload. At the January CalSAWS conference, Imperial County shared highlights about the impact that two-way messaging has had on interactions with their Customers; citing reduced call volumes month over month stemming from their push to make it part of their county process.

### Enhancing Integration with County Processes throughout User Centered Design Process

BenefitsCal marked CalSAWS' initial venture into integrating User-Centered Design (UCD) in developing and improving public-facing solutions within the CalSAWS enterprise. Over the past four years, we've refined our methods and deepened our understanding of user experiences with BenefitsCal. While counties have engaged in the UCD process, we've identified further opportunities to enhance insights into user interactions, as detailed in our updated UCD process (Figure 4.4-3).



**Figure 4.4-3. BenefitsCal UCD Process.**

Collaborating with counties throughout the UCD lifecycle enhances our understanding of their differences and similarities, facilitating transparent communication about changes impacting county processes. We have added to our familiarity with CalSAWS processes through additions to our team with former county case workers, county help desk staff, as well as individuals that have helped to train counties on CalSAWS. Continuous involvement aligns counties with BenefitsCal updates and prepares them



for new feature rollouts. Table 4.4-2 below outlines our approach to better integrate with county business processes.

Enhancing County Engagement throughout UCD process		
UCD Phase	Current Engagement	Enhancements to Engagement
<b>Dream</b>	<ul style="list-style-type: none"> <li>Certain counties provide enhancement requests through the Collaboration Model.</li> </ul>	<ul style="list-style-type: none"> <li>Incorporate lessons learned from prior county worker research (including workers that have joined our Deloitte team in the last two to three years), interviews, and call center data into the collaboration model.</li> <li>Cross reference the foundational county to be business process models created through our work on CalWIN ISS to understand impacts to county processes.</li> <li>Suggestion box for county workers to provide feedback on BenefitsCal alignment with county processes.</li> <li>Defining Objective and Key Results (OKRs) for ideas relative to impact on county business processes.</li> </ul>
<b>Discover &amp; Define</b>	<ul style="list-style-type: none"> <li>County worker interviews and focus groups</li> <li>County visits for post go live support for in CalWIN counties</li> </ul>	<ul style="list-style-type: none"> <li>Develop discussion guides to strategically engage workers identified through pre-interview research.</li> <li>Strategic county visits to define needs for appropriate solutions for problems.</li> <li>County worker Workflow Shadowing refine journey maps, personas, modes, and mindsets.</li> <li>Confirming that Objective and Key Results (OKRs) align with county needs.</li> <li>Execute co-discovery with CalSAWS M&amp;E and CalSAWS Infrastructure Contractors to present a holistic end to end design.</li> <li>Conduct Pre-interview research and preparations through discussions with our team members that are former California case workers.</li> </ul>
<b>Design &amp; Deliver</b>	<ul style="list-style-type: none"> <li>Self-service portal committee meetings</li> <li>County work groups</li> </ul>	<ul style="list-style-type: none"> <li>Through our defined journey maps, we can progressively engage targeted County workgroups at various stages of the design process.</li> <li>Assess impact to county business process through design reviews.</li> <li>Identify Change Champions - County workers who are selected and trained to drive the feature through to post implementation.</li> <li>Market new features with County staff - Counties and workers are informed of upcoming changes reducing surprises during customer interactions with each release</li> <li>Capitalize on Regional Management Site Visits to provide opportunities for counties to share how BenefitsCal has created positive impacts.</li> <li>Work with the Consortium Customer Engagement Team and CalSAWS M&amp;E Contractor to identify potential changes to county operational processes that may require procedural or process updates as part of readiness activities for adopting the change.</li> </ul>
<b>Develop &amp; Deploy</b>	<ul style="list-style-type: none"> <li>County validation</li> <li>County webinars</li> </ul>	<ul style="list-style-type: none"> <li>Simulate day in a life for county workers and prepare them to better support clients for the new change by illustrating the practical impact of the new features.</li> <li>Prepare customer communication materials to be displayed in county lobbies.</li> </ul>



Enhancing County Engagement throughout UCD process		
	<ul style="list-style-type: none"> <li>Update Job Aids and FACT sheets</li> </ul>	<ul style="list-style-type: none"> <li>Make changes available in a sandbox dev environment open to all county workers to explore the update in their own time. During county focus groups counties expressed a desire to be able to see the changes so they could be familiar and knowledgeable.</li> </ul>
Discern	<ul style="list-style-type: none"> <li>Monitor production and help desk tickets.</li> </ul>	<ul style="list-style-type: none"> <li>Measure outcomes against OKRs defined in Dream and Discover phases to confirm that the county business processes were not negatively impacted.</li> <li>Gather county worker feedback from target enhancement implementation surveys and strategic follow up interviews with change champions.</li> <li>Conduct county site visits post implementation of new features to gather insights and research regarding actual versus intended impact.</li> </ul>

**Table 4.4-2. County Engagement.**

We focus on cross referencing the understanding how changes in each module in BenefitsCal (e.g., application, renewals, supportive services, etc.) map to specific County journey maps to strategically engage appropriate County workers. Strategic engagement of appropriate groups drives tailored solutions for Counties and alignment across CBO, State Partners, and stakeholder groups. To prepare for new features and enhancements with BenefitsCal being released understanding the impact to County workers allows us to prepare together to balance the effort for Counties to prepare for these changes.

The UCD process is not for changes alone to the BenefitsCal. We follow the same process to identify potential operational or procedural enhancements that the Counties may consider to increase the integration of the existing BenefitsCal functionality. As part of the CalWIN migration we did preliminary site visits to assist the counties in their initial adoption of BenefitsCal that provided insight into common themes to increase BenefitsCal usage. Regional Management Site Visits (MSVs) also provided and continue to provide opportunities for counties to share ways they have incorporated BenefitsCal into their county operations.

### Engaging CBOs, State Partners, Stakeholders

To confirm the BenefitsCal enhancements align effectively with county processes, it is crucial to engage CBOs, State Partners, and stakeholders like Advocates, CalSAWS M&E and Infrastructure Contractors, and the FIS team as needed. Their established relationships and insights are crucial for gathering feedback that refines the application. Leveraging these connections through our county worker journey maps enhances our understanding and helps develop targeted questions about county interactions. Table 4.4-3 below outlines our proposed approach to engaging with CBOs, State Partners and Stakeholders as it relates to the impact of BenefitsCal changes to county processes.



Engaging CBOs, State Partners, and Stakeholders		
Entity	Current Engagement	Enhancements to Engagement
<b>CBOs and Advocates</b>	<ul style="list-style-type: none"> <li>• UCD process research</li> <li>• Collaboration model meetings</li> <li>• UCD monthly meetings</li> <li>• Ongoing surveys</li> <li>• Webinars</li> </ul>	<ul style="list-style-type: none"> <li>• Strategically collaborate with CBOs and Advocates to understand relationships between county processes and underserved ethnographic groups.</li> <li>• Engage advocates and CBOs to confirm county and user journey map alignment.</li> <li>• Create iterative feedback loop with CBOs and Advocates through surveys to help prepare for county visits.</li> <li>• Vet copy choices for constituent groups by native speakers to reduce in person touchpoints with counties.</li> <li>• Conduct site visits at CBOs to gain additional perspective and awareness around their interactions and engagement with Customers whom they support.</li> </ul>
<b>State Partners (e.g., CDSS, DHCS)</b>	<ul style="list-style-type: none"> <li>• UCD monthly meetings</li> <li>• Offline review of All County Letters</li> <li>• Ad hoc policy review sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Strategically collaborate with state partners to understand policy impacts to county process and worker journeys</li> <li>• Engage state partners to confirm county and user journey map alignment.</li> <li>• Create an operational policy checklist for engaging state partners with respect to county workflow impacts.</li> </ul>
<b>Stakeholders</b>	<ul style="list-style-type: none"> <li>• Regular UCD meetings</li> <li>• Collaboration Model touchpoints</li> <li>• Design touchpoints</li> <li>• Quarterly Stakeholder Meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Build functional process flows with CalSAWS M&amp;E vendor to vet end to end solutions impact across the CalSAWS ecosystem.</li> <li>• Work with CalSAWS M&amp;E and CalSAWS infrastructure teams to review and confirm county worker journey maps.</li> </ul>

**Table 4.4-3. CBO, State Partner, and Stakeholder Engagement.**

## 4.4.2 Approach to Public Communications and Marketing (UA.9)

### 5.2.3.4 Understanding and Approach to User Experience, Marketing and Public Communications

UA9

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

In the past three years, over 4.5 million Californians have used BenefitsCal, with many others opting for traditional channels like local offices or call centers. Despite its substantial user base, BenefitsCal has room to grow, particularly in improving user perception and awareness. We've collaborated with various stakeholders to boost awareness through targeted marketing, yet challenges in adoption and public perception persist due to misinformation and connectivity issues.

Regular use of BenefitsCal is limited as customers typically access their case information only during changes in circumstances or for benefit renewals. Misinformation about system downtimes and the presence of alternative systems like CalHEERS, which splits

user attention, further complicates engagement. To address these challenges, counties have expressed a desire for coordinated communication efforts to simplify messages and reduce customer confusion.

To significantly impact public opinion and user engagement, BenefitsCal's marketing and communication strategies need an overhaul. The revised strategy will focus on increasing direct interactions through mail, email, and texts for current users, while enhancing public awareness via organic social media and paid media campaigns. This approach aims to streamline communications and effectively target potential users at critical decision-making points.

### Where we Are Today – How We've Supported BenefitsCal

Since 2021, Deloitte has continuously enhanced the awareness and adoption of BenefitsCal across multiple channels:

**Public Meetings.** The BenefitsCal Team has been presenting updates on BenefitsCal adoption and system changes in the Monthly and PSC meetings; as well as, Quarterly Stakeholder, Monthly UCD and Quarterly Collaboration Model meetings. The meetings provide an opportunity to both educate as well as receive input from the public regarding BenefitsCal usage and features. From the very onset, Deloitte initiated Monthly UCD meetings with the public and advocates to share research findings, solicit feedback and provide visibility into future BenefitsCal releases.

**Legislative and Advocate Inquiries.** The BenefitsCal Team, inclusive of our national public relations team, provided ongoing support to the Consortium, CWDA and State Partners with developing content and materials stemming from requests from the legislature regarding adoption and usage of BenefitsCal. Most recently, the team contributed to the Supplemental Report requested by the California legislature.

**YouTube Videos.** The BenefitsCal YouTube channel has uploaded over 21 videos, attracted 10,000 subscribers, and received more than 400,000 views in three years. It provides essential information and detailed 'how-to' guides on topics including application processes, password assistance, and troubleshooting. These videos are also played in local office lobbies today to inform Customers of other ways to access services.

**Marketing Toolkits.** As part of an omnichannel marketing strategy, Deloitte developed a Marketing Toolkit in 2021 and 2022, distributed to Counties and Community-Based Organizations (CBOs) via separate SharePoint drives. To promote and encourage the use of these toolkits, Deloitte created a detailed promotional poster outlining access information, as shown in Figure 4.4-4.



Figure 4.4-4 BenefitsCal Poster.



**Collaboration with Counties and CBOs.** The development of these marketing materials for public communication was a collaborative effort, involving the Consortium and its partners, as well as representatives from county offices. These stakeholders provided valuable insights into the types of informative content necessary to enhance awareness, understanding, and adoption of BenefitsCal. To effectively reach diverse audiences, we collaborated monthly with customer advocates and CBOs. This partnership helped us tailor our messages to specific audience needs, crafting marketing materials at a sixth grade reading level and translating them into twenty languages for clarity and accessibility.



**Figure 4.4-5. Robin the Bear BenefitsCal Mascot.**

**BenefitsCal Communications and Marketing Campaign.** In 2023, Deloitte spearheaded the Integrated Communications and Marketing Campaign for BenefitsCal, reaching over 15 million enrollees in 58 counties. The campaign involved numerous stakeholders and produced 12 marketing deliverables in 20 languages. Key efforts included branding "Robin the Bear" as the mascot, creating an animated video, and launching a 6-stage email campaign, as shown in Figure 4.4-5. The campaign not only improved operational efficiency by reducing in-person visits and alleviating district office traffic but also achieved significant digital engagement.

The video featuring the mascot reached nearly 5,000 views in 10 months, and the email campaign's click-through rates exceeded government standards. This demonstrates Deloitte's ability to effectively combine creative communications with digital innovation, enhancing BenefitsCal service accessibility and user engagement across the state.

The email campaigns for BenefitsCal, featuring strategic calls to action (CTAs), demonstrated remarkable success. With 578,000 emails sent, response rates exceeded government industry standards. The average open rate reached 71%, significantly higher than the typical 19% for government communications. As a result, these campaigns prompted over 129,000 actions on the portal in just the first month.

**Brochures, Flyers, and Fact Sheets.** Since 2021, the development of customizable informational flyers has been underway to promote BenefitsCal across Counties, shown in Figure 4.4-6. This effort involves collaboration with Regional Managers and CBOs to



**Figure 4.4-6. BenefitsCal Brochures.**

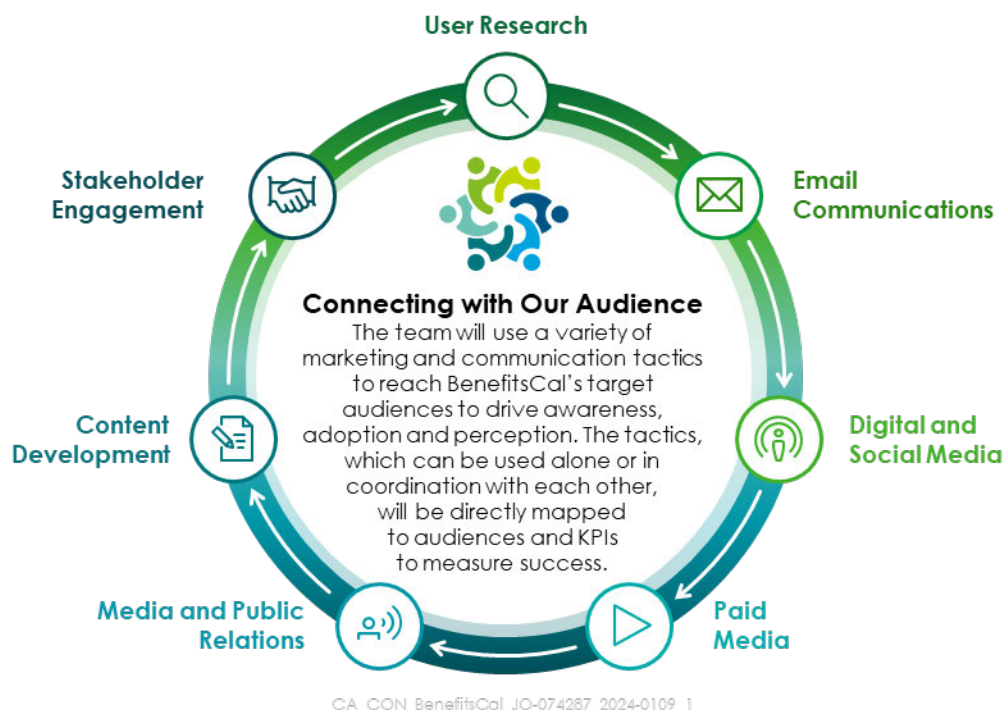
confirm the flyers maintain consistent, up-to-date messaging in all threshold languages.

In 2024, creative customer communications for BenefitsCal included Q&As and Fact Sheets in twenty languages, explaining new features like case linking and multifactor authentication. These materials were cost-effectively repurposed for social media, enhancing awareness and encouraging engagement on BenefitsCal's X (formerly Twitter) and Facebook pages.

### Where we Are Going – Deloitte's Plan to Enhance the Awareness, Adoption, and Public Sentiment of the BenefitsCal Application

We enhance BenefitsCal by building on existing achievements. Deloitte adopts a holistic perspective to evolve into a user-focused marketing and public communication strategy, utilizing a multichannel approach to engage users, potential users, and stakeholders. This strategy, informed by data and in-depth audience research, facilitates broad communication across various channels, fostering proactive interactions and trust within public and stakeholder communities.

Our approach, aligned with the UCD processes in Sections 4.2 and 4.4.1, provides BenefitsCal a consistent framework for collaboration and ideation with the CalSAWS Consortium and stakeholders, promoting key program priorities. See Figure 4.4-7 below for a summary.



**Figure 4.4-7. Deloitte's Approach to BenefitsCal Marketing, Public Communications, and Stakeholder Engagement.**

Our strategy for BenefitsCal aligns with CalSAWS campaign goals and success metrics, focusing on understanding audience needs to drive awareness, adoption, and positive perception through strategically timed engagements across multiple touchpoints. By conducting comprehensive user and audience research, we transition from a reactive



to a proactive approach, effectively targeting specific users, non-users, and stakeholders with tailored communications and marketing tactics. This method empowers CalSAWS to control the narrative with the public and media, fostering stronger, more trusting relationships with all stakeholders, expanding the user base, and enhancing service delivery.

### Tactical Considerations to Enhance Marketing and Public Communications

Our strategy will enhance BenefitsCal's marketing and public communications to boost awareness, increase adoption, and improve public perception. Drawing on insights from three years of social media monitoring, survey data analysis, service desk reviews, customer interviews, focus group discussions, and usage pattern analysis, we understand the current landscape and the programmatic needs outlined in the SOW. Leveraging Deloitte's capabilities and experience, we recommend specific activities, tools, and tactics to advance BenefitsCal's marketing and communications efforts. As the primary interface for self-service in California's eligibility and enrollment process, BenefitsCal is crucial to the overall user experience. Our recommendations, detailed in Figure 4.4-8, form part of a multi- or omnichannel strategy that establishes multiple touchpoints for engaging our target audience with BenefitsCal. This approach considers specific audience segments, tailoring content and messaging to effectively prompt action across different channels.



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**Figure 4.4-8. Connecting with Our Audience by Reaching Them on Multiple Channels.**

### Conducting User Research and Identifying Audience Segments

Our existing data on BenefitsCal users presents an opportunity to gain greater insights into their demographics, behaviors, motivations, and preferred communication channels. Our proven process, previously implemented for clients like Georgia Access, DHS, and TennCare, involves both **quantitative** and **qualitative** research methods. This

includes stakeholder interviews, analysis of current CalSAWS and BenefitsCal data, and extensive demographic and industry benchmarking.

We analyze this data to define and segment our target audiences, a technique that groups users by shared needs, enhancing message delivery through optimal channels at times they're most receptive. We create 'personas' that detail each group's characteristics and priorities, guiding our alignment with their values. Key elements of personas may include:

- Fictitious name
- Representative photo or avatar
- A quote capturing sentiment
- Demographic information such as location, age and languages spoken
- Potential BenefitsCal programs or services of interest
- Behaviors and attitudes
- Challenges and/or pain points
- Goals and motivations

The personas outline communication and media channels enabling us to pinpoint engagement opportunities that align with life events or key dates for BenefitsCal programs like Disaster CalFresh or Medi-Cal. By conducting user research and audience segmentation, we gain a deeper understanding of our audiences, allowing us to craft impactful content and deliver it through the appropriate channels. This approach not only personalizes the user experience but also drives greater adoption of the BenefitsCal application.

### **Expanding the Current BenefitsCal Marketing and Public Communications Plan**

We recognize the need to enhance public awareness, adoption, and perception of the BenefitsCal application. While an existing Marketing and Public Communications Plan is in place, expanding this into a more comprehensive strategy will better enable CalSAWS to achieve their goals.

Enhancements to the BenefitsCal Marketing and Public Communications Plan are achieved through key activities conducted alongside the Consortium and other stakeholders:

- Align on goals: Broaden awareness, encourage adoption and retention, and enhance public perception of the application's benefits
- Identify the audiences or personas we want to target
- Identify marketing activities, tactics, and channel strategies
- Develop and distribute content across channels, noting size and translation requirements
- Establish key performance indicators (KPIs) to measure success
- Define budget and implementation timeline
- Regularly review and maintain the Plan
- Develop campaign report templates with KPIs, benchmarks, highlights, and optimization recommendations



Using the PESO Model (see Figure 4.4-9), our plan encompasses all media types—paid, earned, shared, and owned. We suggest boosting the current BenefitsCal Marketing and Public Communications Campaign by adding channels and tactics, including social media strategies, creative content, email communications, website surveys, and paid media. Below, we detail how we can help BenefitsCal meet their goals by enhancing and expanding outreach channels to effectively reach target audiences.

### Electronic and Web-based Communications

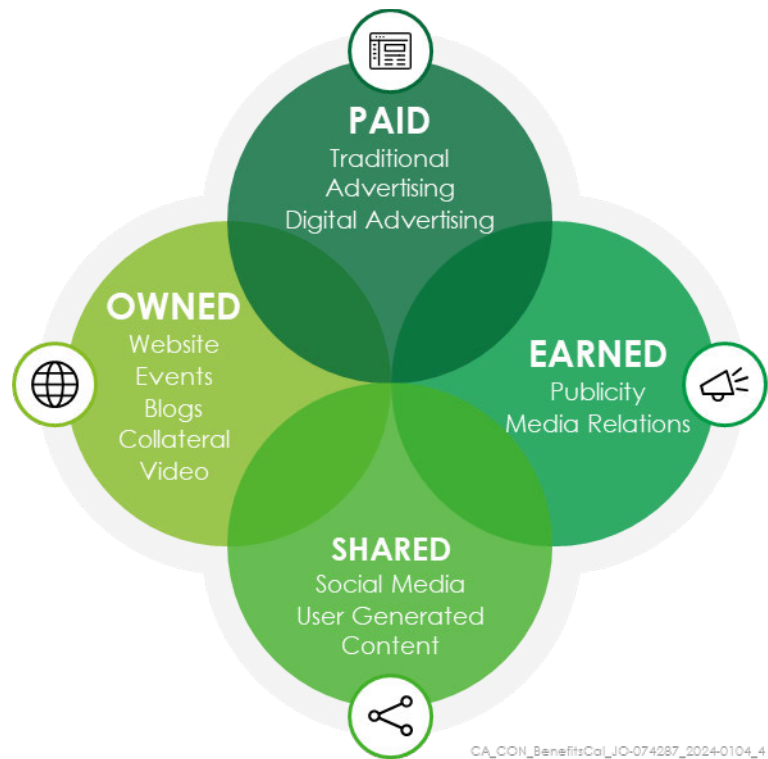
We recognize the importance of digital channels—social media, email, and the BenefitsCal website—for engaging target audiences. By optimizing content across these platforms with tailored, clear, and creative messaging, we aim to enhance audience interaction. Recommended strategies include diversified social media posts, targeted emails, e-newsletters, and interactive website surveys.

### Email Communications

Effective email drip campaigns are at the heart of how government agencies drive awareness, adoption, and enrollment in benefits programs, helping their most vulnerable customers achieve positive outcomes. Deloitte's full-service marketing technology (MarTech) capabilities, approach, and processes allow us to create and automate email drip campaigns, as well as manage contact lists, through the email automation or customer relationship management (CRM) platform of their preference, such as Pinpoint, the current platform of CalSAWS.

BenefitsCal email communications are not new. We have worked with the CalSAWS Consortium and stakeholders to successfully implement annual BenefitsCal Marketing and Communications Campaigns reaching over 500,000 individuals. This past year, with our support, the BenefitsCal team met or exceeded KPIs, like email engagement rates, leading to higher-than-average results for click-throughs and actions from campaigns.

Our strategy for BenefitsCal aims to enhance existing campaigns by employing our proven engagement approach, aligning with the program's strategic marketing and communication goals. We have successfully implemented this strategy in states like



**Figure 4.4-9. Public Communications Plan PESO.**

Kentucky and Wisconsin, leading to increased enrollment in benefit programs and greater adoption of self-service channels.

We provide a comprehensive suite of templates and accelerators to swiftly create, automate, and manage email drip campaigns for BenefitsCal. Our approach includes strategizing, designing, evaluating, and implementing targeted email marketing campaigns with engaging messages and direct calls to action. We efficiently manage subscriber lists across different audiences, maintaining respect for contact limits and crafting personalized journeys based on campaign strategies and subscriber behavior data. This method is effective for ongoing campaigns and can be adapted for major updates or new features, keeping users informed about system enhancements, downtime, and availability, thereby fostering informed decisions about the benefits of these improvements.

### **Digital and Social media**

With years of experience crafting digital and social media strategies for government and public sector clients, including the Centers for Disease Control (CDC), [REDACTED] the Census Bureau, and CSAA Insurance, we will enhance BenefitsCal's social media presence by developing standout content across relevant platforms.

We recommend expanding the brand's organic social media presence to engage target audiences across multiple platforms, enhancing the likelihood of content sharing by stakeholders and partners. Facebook is ideal for broad reach, while Instagram and Snapchat effectively engage younger demographics. Additionally, platforms like Nextdoor target specific geographic areas. Our recent social media campaigns on Twitter/X and Facebook, which highlighted BenefitsCal's new case linking enhancements and multi-factor authentication requirements, demonstrate our ability to leverage multiple channels concurrently to boost engagement.

Integrating WhatsApp with the BenefitsCal Facebook page offers a strategic opportunity to



enhance two-way communication, leveraging a widely used platform to optimize operational costs and improve customer engagement. By using WhatsApp to send messages to opted-in customers, we can significantly reduce costs per message and engage a larger audience who prefer WhatsApp for its affordability compared to other messaging services.

Our strategy to enhance BenefitsCal's organic reach involves creating well-planned, timely content tailored to each platform's specifications and aligned with our broader campaign strategy. We use a social media content calendar to effectively manage and schedule content across selected platforms, confirming each piece aligns with marketing goals and is distributed efficiently. The calendar includes several key elements to optimize scheduling and distribution:

- Content details, such as upcoming BenefitsCal feature enhancements, Q&As, customer insights, and positive stories about how BenefitsCal has improved lives
- KPIs for each post (e.g., likes, shares, comments, click-through rates)
- Review schedules to maintain quality control and obtain proper approvals
- Audience and campaign alignment

To enhance the effectiveness of our campaigns, we frequently test various creative contents and messages to see what resonates best with BenefitsCal's target audiences. Leveraging these insights, Deloitte continuously refines our strategies. The broader social media strategy also facilitates streamlined posting for BenefitsCal Counties, CBOs, and functional staff, fostering consistent messaging across all platforms. This collaborative approach not only aligns communications but also shifts the burden from responsive to proactive messaging, reducing stress for county employees and CBOs.

By incorporating a comprehensive social strategy to the overall BenefitsCal Marketing and Communications Plan and Program, BenefitsCal can drive the messages that are important to its users and interested parties (e.g., when their renewals are coming due or have verifications that are pending). In doing so, they should see improved awareness and engagement with these important user groups of the application, its programs and services.

## **Website**

When organized and optimized, websites help audiences quickly find key resources, critical news, and information, and they build trust with an organization. BenefitsCal's web presence—such as the BenefitsCal marketing site at [info.benefitscal.com](https://info.benefitscal.com)—offers an opportunity to engage with your intended audience. This engagement is not only to deliver information and resources but also to track performance and gather feedback.

In our approach to marketing and public communications, we identify opportunities to use the website as a communication hub for stakeholders and the public. Real-time updates via timely web banners, a resource center with downloadable content, transparent dashboards that share important and evolving health metrics, and interactive elements such as webinars and forums help to facilitate direct engagement, so that all users, regardless of their technical proficiency, can easily access information. It is a place where we share Customer testimonials and humanized metrics providing

stakeholders, users, or potential users with positive user feedback that helps nudge them towards adoption and better perception. (See Section 4.4.3 for more information on humanized metrics and customer testimonials.)

[REDACTED]

[REDACTED]

[REDACTED]

### **Paid Media**

Paid media is essential for boosting awareness and adoption of BenefitsCal's applications, programs, and services, forming a key part of an integrated marketing and public communications strategy. It provides a controlled way to share information and engage targeted audiences, extending reach beyond organic methods. Investing in paid media effectively drives traffic to key sites like [BenefitsCal.com](https://www.benefitscal.com) and the 'Apply for Benefits' page, significantly enhancing visibility among the target demographic.



## Paid Search and Social



For BenefitsCal, we maintain a continuous "Always-on" Google campaign to sustain persistent search engine visibility for both current and potential users. We establish clear campaign objectives and select keywords that resonate with BenefitsCal's offerings and user search habits. Our approach includes setting up and fine-tuning Google Ads using both automated and manual bidding to optimize visibility and ROI. Ongoing adjustments to keyword bids, ad copy, and landing pages are essential for adapting to performance data and market shifts, maintaining sustained campaign effectiveness and efficiency.

For social media platforms like Facebook, we customize campaigns to specific objectives, such as increasing awareness of Medi-Cal enrollment or promoting programs like CalFresh or Cash Assistance Programs for Immigrants. Digital platforms offer advanced targeting options that enable precise content delivery based on user behaviors, interests, and demographics, derived from our user research personas. We also set daily spending limits to adhere to budget constraints. These targeting capabilities heighten the relevance and impact of BenefitsCal campaigns by focusing on pertinent users, boosting their awareness of available programs, and directing them towards application and enrollment.

During crises or disasters, Meta can geofence campaigns to specific geographic areas, enabling BenefitsCal to promptly disseminate vital information to users within those regions.

### Other Paid Media Considerations

We engage broad and specific audiences through a mix of paid media channels, ranging from digital (e.g., streaming audio, OTT/CTV) to traditional (e.g., OOH, terrestrial TV and radio, print ads). The strategic selection of these channels, based on the media budget, enhances campaign visibility

A decorative vertical banner on the right side of the page. It features a grayscale image of a woman's face, partially obscured by a large black redaction box. The word "Improving" is written in a white, cursive script across the top of the banner.

Improving

and ROI by effectively disseminating key messages of BenefitsCal at multiple touchpoints along the user journey.



This strategic approach targeted users at various stages of the marketing funnel—awareness, consideration, and action—effectively highlighting the benefits of health insurance and promoting enrollment during open periods.

Integrating paid media with organic, earned, and shared media strategies forms a comprehensive marketing mix that not only facilitates messages reach and resonate with the intended BenefitsCal audiences but also drives engagement and increases adoption.

Strong public relations and media engagement are crucial for BenefitsCal to control its narrative and maintain a positive image, regardless of crisis situations. Deloitte enhances this through strategic story shaping and leveraging established relationships with key local and state media outlets, fostering positive, earned media awareness for BenefitsCal's programs, services, and application. Effective methods to build and sustain these media relationships, as seen in Table 4.4-4 include:

Method	How it Will be Enacted
<b>Create Media Lists</b>	Effective media relationships are cultivated through the development and maintenance of comprehensive lists and tracking services across industry, local, and state levels. Our strategy includes issuing press releases, creating media opportunities, and conducting geographically targeted outreach.
<b>Establish Process for Media Response</b>	We collaborate with CalSAWS to establish a responsive process for handling media inquiries, developing a structured messaging architecture that allows for the customization of generic responses. This strategy confirms prompt replies to maximize control over media coverage.
<b>Clips and News Tracking</b>	Regular updates of news clips and online sentiment tracking help CalSAWS keep messaging aligned with the latest developments in California. This strategy places CalSAWS at the forefront of shaping narratives about BenefitsCal.
<b>Ongoing Media Outreach and Media Relationship Cultivation</b>	Strategic research and development of strong, relatable stories support the BenefitsCal narrative, pitched directly to media partners. Additionally, identifying editorial opportunities allows the Consortium to stay ahead of breaking news.
<b>Monitor Public Sentiment</b>	Social listening tools like Sprinklr are employed to monitor public sentiment and promptly address news coverage and public discussions, mitigating negative or misleading information. Introduced during the initial BenefitsCal launch in 2021, these tools provide insights into both BenefitsCal and the broader CalSAWS enterprise, including other access channels like contact centers.

**Table 4.4-4. Methods to Sustain Media Relationships.**



## **Crisis and Special Events**

In collaboration with CalSAWS and BenefitsCal staff, we develop and implement a crisis communication strategy to address potential crises such as natural disasters and mitigate negative media impacts. This effort includes providing media training for key staff and crafting adaptable, evergreen talking points to confirm readiness for an effective response. We also actively monitor and manage responses to legitimate inquiries from reliable sources.

Our creative team designs communications materials that respect local traditions, cultures, and languages, fostering sensitivity during crises. These materials, aligned with CalSAWS's objectives, serve as public relations tools to disseminate the BenefitsCal message through digital and on-the-ground channels at special events.

## **Content Development and Creative Design**

Our public communication and stakeholder outreach emphasize the importance of high-quality marketing and communications materials to create meaningful experiences for BenefitsCal users. Our designers have demonstrated their capabilities with projects like Robin the Bear, multimedia content, and printable materials. At Deloitte, our creative team collaborates closely with strategists throughout the entire creative lifecycle, developing compelling visuals and dynamic multimedia that enhance engagement and reach.

## **Branded Creative and Campaign Assets**

Our public communication and stakeholder outreach focus on delivering high-quality marketing and communications materials to enhance the user experience for BenefitsCal. Our designers, proven through projects like Robin the Bear and various multimedia and print materials, work in tandem with strategists to craft compelling visuals and dynamic content across all stages of the creative lifecycle. To execute the Marketing and Public Communications Plan, our team leverages audience insights and personas to create a range of materials, from social media content to web graphics and event-specific materials. Early user research enables us to efficiently handle both ad hoc requests and extensive projects, confirming timely and effective delivery. This includes producing multimedia videos, posters, flyers, FAQs, presentations, reports, and



email campaigns. Additionally, our experience extends to creating brand and campaign assets for other projects like Georgia Access, enhancing our capability to generate impactful stakeholder communications.

### Translation Services

Communicating effectively in a user's native language is crucial for engagement, trust and understanding. Through our partnership with Humble translation services, we translate all materials into threshold languages while maintaining 508 compliance. Humble's expertise in BenefitsCal's languages, marketing materials, and processes allows for immediate engagement when needed. Their diverse team of native-speaking translators guarantees cultural and grammatical precision, adheres to plain-language standards, and delivers accurately and promptly, even under tight deadlines. Additionally, Humble's ability to adapt English content from various formats like PowerPoint and PDFs into other languages across documents, flyers, brochures, and other marketing materials offers significant time and cost savings for CalSAWS.

## 4.4.3 Approach to Engaging the Stakeholder Community (UA.10)

### 5.2.3.4 Understanding and Approach to User Experience, Marketing and Public Communications

#### UA10

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

From the outset of the BenefitsCal project, stakeholders have been integral to the design and development of our marketing and communications strategies. Their insights have shaped the BenefitsCal website and informed the execution of our annual marketing campaigns. Throughout 2022 and 2023, we deepened our engagement with stakeholders to refine our data gathering, communication plans, and creative content, establishing a robust process for incorporating their feedback. This collaboration has enhanced our review processes and significantly improved the impact of the marketing materials distributed to stakeholders for their use in outreach and user interactions.

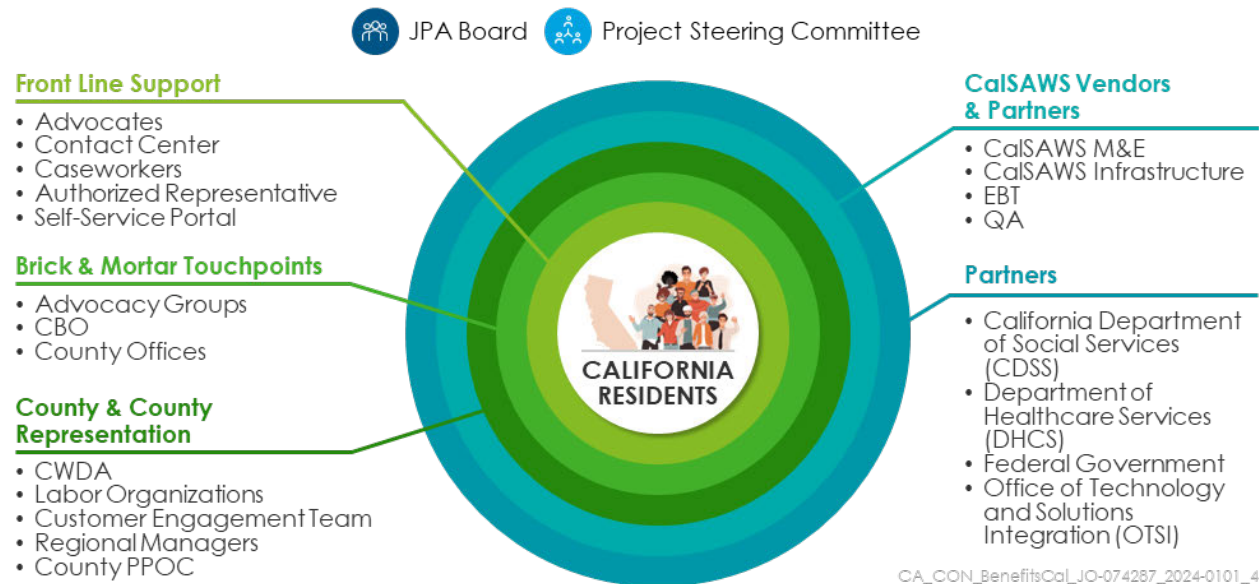
Despite these advancements, there is potential to further amplify stakeholder involvement, allowing them to experience more transparent and frequent updates and have a greater say in outreach initiatives. Recognizing their crucial role as "brand ambassadors," stakeholders are woven into the fabric of our comprehensive outreach strategy, making them feel valued and heard. This approach not only fosters their continued support but also enhances their ability to promote BenefitsCal effectively to both current and prospective users.



## Current State - How We Engage BenefitsCal's Stakeholders

### Key Stakeholders Across the State of California

Concentric rings highlight each stakeholder's proximity/relationship to the California resident and to each other



**Figure 4.4-10. Current BenefitsCal Stakeholder Groups.**

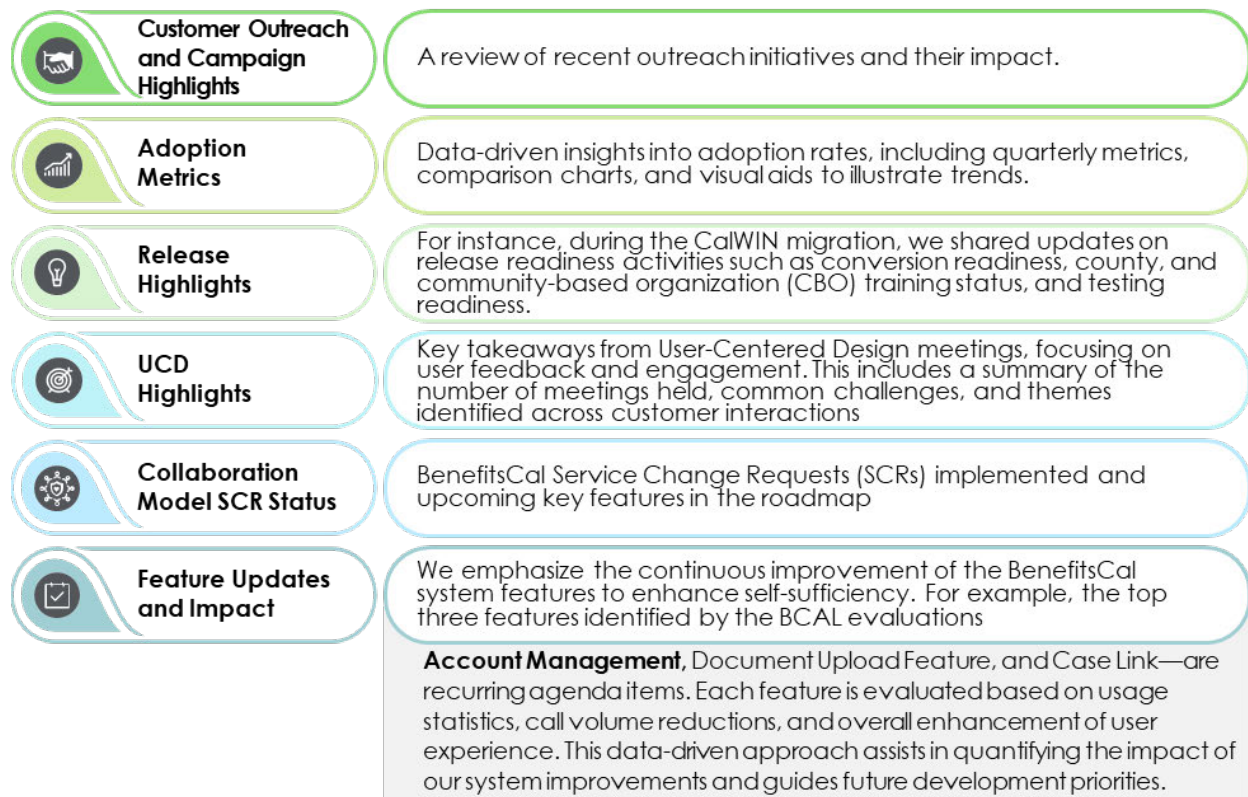
With over 20 years of experience in California, our understanding of the state's diverse stakeholder community (see Figure 4.4-10 above) directly supports our clients' needs. This expertise is crucial in managing complex ecosystems and achieving effective service delivery. As the ISS vendor during the CalWIN migration and a collaborative partner on BenefitsCal for the past three years, our focus remains on integrating diverse stakeholder perspectives to facilitate inclusive and equitable access to the BenefitsCal Application for customers across all 58 counties.

Stakeholder engagement is integral to the BenefitsCal project and is woven into every phase of the UCD process as outlined in Section 4.2. We actively engage with the CalSAWS community through various channels and forums, collaborating with the Consortium to increase awareness of the BenefitsCal application and gather essential feedback to boost adoption. Our engagement extends to public meetings, which are structured with agendas tailored to meet the unique needs of each audience. These meetings serve as crucial touchpoints for ongoing dialogue and collaboration, allowing stakeholder feedback to be continuously integrated into our processes as shown in Figure 4.4-11.



**Figure 4.4-11. BenefitsCal Stakeholder Engagement.**

We actively participate in the **Monthly JPA meetings**, providing an executive overview of key developments relevant to Counties, regional managers, and the JPA board. In the **Project Steering Committee (PSC) meetings**, we cover agenda topics in detail. During the **Quarterly Stakeholder meetings**, we work closely with State Partners, the Consortium, and the California Welfare Directors Association (CWDA), focusing on advocate-driven topics. Our main goal across these forums is to share updates on significant system enhancements, upcoming features, and strategic improvements impacting Customers and stakeholders. We start our agenda planning with the Consortium a few weeks before each meeting to verify there is ample time to integrate stakeholder feedback. A typical agenda for these meetings, as shown in Figure 4.4-12 includes:



CA\_CON\_BenefitsCal\_JO-074287\_2024-1002

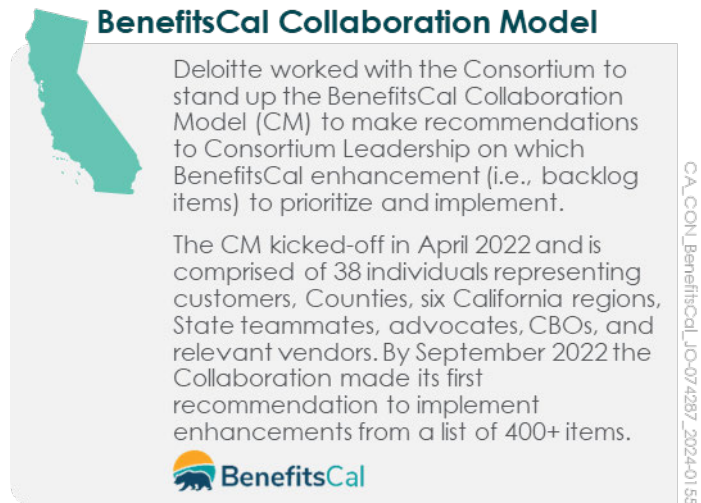
**Figure 4.4-12. Typical Quarterly Stakeholder Meeting Agenda.**

**Quarterly Collaboration Model Meetings:** Our engagement with the Collaboration Model (CM) - see Figure 4.4-13 – extends beyond mere participation in meetings. Deloitte has worked closely with Consortium stakeholders to establish the CM as a platform for capturing the voice of the Customer and other CalSAWS stakeholders. Our preparations for the quarterly CM meetings begin well in advance, with stakeholders filling out the Enhancement Request Form using the agreed-upon CalSAWS template.

Deloitte identifies system enhancements that could positively impact Customers, CBOs, and County experience and promote self-sufficiency leveraging various channels such as continuous application monitoring, Customer feedback and surveys, ongoing production analysis, help desk collaboration, market scanning, and user research



activities. These recommendations are then presented to the Consortium for review and submitted to the CM for prioritization. Our BenefitsCal Functional and Research team collaborates with the CalSAWS Consortium Project Team to assess the completeness of the enhancement forms and to advance the Service Change Requests (SCRs) for further discussion in the CM meetings. Once priorities are established through the CM voting process, SCRs and research items are logged in JIRA for further effort estimation and/or completion of UCD generative research with the required stakeholder groups.



**Figure 4.4-13. BenefitsCal Collaboration Model.**

Our Monthly UCD meetings serve two primary purposes. First, we present research findings on priority items from the previous quarterly CM meetings, involving targeted research with specific user groups, followed by discussions on the findings and potential next steps with stakeholders. Second, we dedicate the latter part of the meeting to review SCR designs for upcoming releases that include public-facing changes. During these sessions, we capture stakeholder feedback and conduct an offline review of the SCR designs through our established project process, which also involves collecting further feedback via a comment log. The final design is published after addressing all comments.

### **Stakeholder Engagement through Publications and AskCalSAWS**

In addition to meetings and public forums, BenefitsCal consolidates essential information for public and county use at <https://www.calsaws.org/benefitscal/>.

Key resources available include:

- BenefitsCal flyers
- Quick Reference Guides
- YouTube links to Portal feature tutorials
- Customer Experience (CX) Reports, including release notes and quarterly cumulative reviews
- Quarterly System Outage Information

Additionally, AskCalSAWS on CalSAWS.org serves as an active channel for receiving and addressing issues and challenges faced by the public and CBOs while using BenefitsCal.

Despite our active engagement and feedback mechanisms, we recognize the need for a more strategic approach to stakeholder management. We are aware of the challenges Counties face with change management and release readiness for major

BenefitsCal feature releases. It is crucial for BenefitsCal to maintain a consistent message in public forums and control the narrative by aligning with the Consortium's mission. This mission strives to expand access to BenefitsCal for vulnerable populations, increase portal engagement and adoption, streamline the self-service experience, and lighten the workload for county staff. Our strategy involves proactive communication about adoption rates and enhancing stakeholder awareness with clear, metrics-driven data. By increasing transparency and the frequency of our communications, we aim to improve stakeholder management. The subsequent sub-sections will detail our approach to boost adoption, awareness, and the perception of the stakeholder community.

### **Future State – Deloitte's Commitment to Stakeholder Engagement in California**

Stakeholders are an important piece of the BenefitsCal story. They are a trustworthy communication arm of BenefitsCal connecting directly with the Californians that use and interact with the BenefitsCal application. Since our work began in 2021, we made great strides to create a more transparent ecosystem for CalSAWS to engage; however, there are still improvements that can be made to develop a stronger, more trusting and coordinating relationship.

Our approach to Stakeholder Engagement is incorporated in the broader Marketing, Public Communications, and Stakeholder Engagement Approach outlined in Section 4.4.2 and in Figure 4.4-14. Because stakeholder engagement should not live in a vacuum, all stakeholder activities work together with marketing and public communications and in alignment with the broader UCD process. Stakeholders are not only groups with a stake in the success of BenefitsCal but are also important brand ambassadors for the application, programs, and services.

While we've worked side by side with the CalSAWS Consortium and BenefitsCal stakeholders, it is important that we have a more formal outline of our stakeholders, our interaction and communication points, and topics for which we need to engage. This helps BenefitsCal



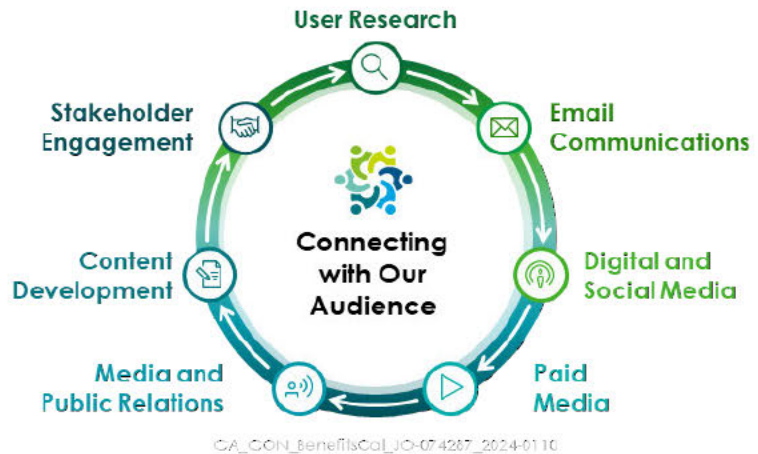
move from a responsive posture regarding stakeholder engagement and communications to a more proactive position.

### Formalizing Our Stakeholder Engagement

Our approach features a stakeholder engagement strategy aligned with CalSAWS programmatic goals, fostering transparency, stronger relationships, and wider acceptance of the BenefitsCal application among

stakeholders and vulnerable Californians. We conduct a stakeholder mapping exercise to develop a communication framework for engaging with the Stakeholder Community on key issues and services. This involves key activities to identify, analyze, and prioritize stakeholders concerning the BenefitsCal application. This exercise includes:

1. **Identification of BenefitsCal Stakeholders:** We already understand the BenefitsCal stakeholders as shown in Figure 4.4-10. Mapping these groups clarifies their interactions with BenefitsCal and highlights potential gaps or expansion opportunities. For instance, leveraging our ties with the Department of Education, Department of Aging, CalHEERS, Covered California, and the University and State systems, we can collaborate with organizations like the California Higher Education Basic Needs Association (CHEBNA), Catholic Charities, and River City Food Bank to enhance the network's awareness and adoption of BenefitsCal's programs and services.
2. **Profiling Stakeholder Interests and Concerns:** During this step, we profile stakeholder interests, concerns, and the degree of influence they have on BenefitsCal and public users. This involves understanding their power, interest, and how they are likely to be affected by BenefitsCal application updates, changes, and goals.
3. **Prioritization of Knowledge Transfer Needs:** We prioritize stakeholders by their involvement and knowledge needs in awareness, adoption, and perception, focusing efforts where they are most effective for communication and engagement.
4. **Visualization of Relationships:** Mapping stakeholder interrelationships is crucial for understanding their dependencies and influences (e.g., County workers and CBOs, State Partners and Counties), including their external engagements. This insight informs our engagement and communication strategies, revealing how these groups interact with the public and identifying opportunities for enhanced support and outreach.
5. **Setting the Stage for Engagement Strategies:** The stakeholder map informs a comprehensive matrix that outlines engagement strategies, detailing



**Figure 4.4-14. Deloitte's Approach to BenefitsCal Marketing, Public Communications, and Stakeholder Engagement.**

communication plans, addressing concerns, incorporating feedback, and involving stakeholders effectively in BenefitsCal processes.

6. **Review and Analysis:** After mapping, we review the stakeholder map and matrix with the Consortium and the stakeholder groups to confirm it accurately reflects the stakeholder landscape and their respective needs.

These steps are vital for managing BenefitsCal's stakeholder relationships to boost application adoption and satisfaction. The stakeholder map and matrix should be dynamic, regularly updated to reflect changes in stakeholder interest and influence, feedback, new goals, and updates to BenefitsCal's programs and strategic objectives.

### Key Future Enhancements to Improve Partner Relationships, Application Perception, and Adoption

#### OKRs / Success Metrics

Utilizing OKRs and success metrics enhances BenefitsCal's perception by aligning stakeholder goals, measured by clear objectives like 'Reduce workload effort to process renewals,' with specific outcomes such as 'Increase Medi-Cal renewals via BenefitsCal by 20%,' thereby improving transparency and accountability.

Success metrics are key, offering insights into user engagement with BenefitsCal through completion rates, feedback scores, and uptime statistics. Regular updates—via stakeholder presentations, reports, or dashboards—facilitate transparent communication about the platform's performance and improvement areas. This approach keeps stakeholders informed, promotes continuous improvement, and enhances our engagement, public communications, and marketing strategies. It clearly connects strategic objectives to tangible impacts, underscoring BenefitsCal's value.

Throughout the UCD process, we will redefine and measure OKRs and our success metrics to foster better engagement and facilitate broader understanding of BenefitsCal's goals to achieve broader adoption and perception from stakeholders.

#### Helping Stakeholders Help BenefitsCal Users and Eligible Californians

California's diverse and vast landscape presents unique challenges in widely adopting BenefitsCal, despite its strong brand recognition. The application's success depends on both its technology and the active participation of stakeholders, including county workers and community advocates. By providing these stakeholders with essential reports, data, and marketing materials, we enable them to better support BenefitsCal's end users—Californians.

We are working with SSA leadership to create a CalFresh Web Portal Usage Guide (see Figure 4.4-15), aimed specifically at SSA Technicians. Despite previous webinars and trainings, stakeholders require a more thorough understanding of BenefitsCal's features and opportunities to boost their confidence. This guide, initiated by Deloitte from technician feedback, provides detailed training, user manuals, and continuous support to better prepare stakeholders for assisting users. Through continuous refinement based on discussions, the guide now more effectively equips technicians to help Californians complete their applications over the phone.





**Figure 4.4-15. Sample Materials Developed to Support Adoption with Social Security Administration Users.**

This knowledge empowers stakeholders to launch effective outreach campaigns, educating eligible Californians on how BenefitsCal can streamline their access to essential benefits. Given the diverse demographics served, stakeholders can provide culturally sensitive, tailored assistance, such as multilingual support and workshops in various districts, helping to overcome language or technological barriers.

To enhance the BenefitsCal experience, stakeholders should create robust feedback mechanisms, like surveys and focus groups at community centers, to gather and analyze user feedback. This allows them to advocate for necessary platform improvements, responding to the evolving needs of its users.

By equipping stakeholders with the necessary education, support, and resources, we redefine eligibility assistance in California. BenefitsCal transcends being merely an application to become a community-driven initiative that uplifts every resident with support and opportunities for a better future.

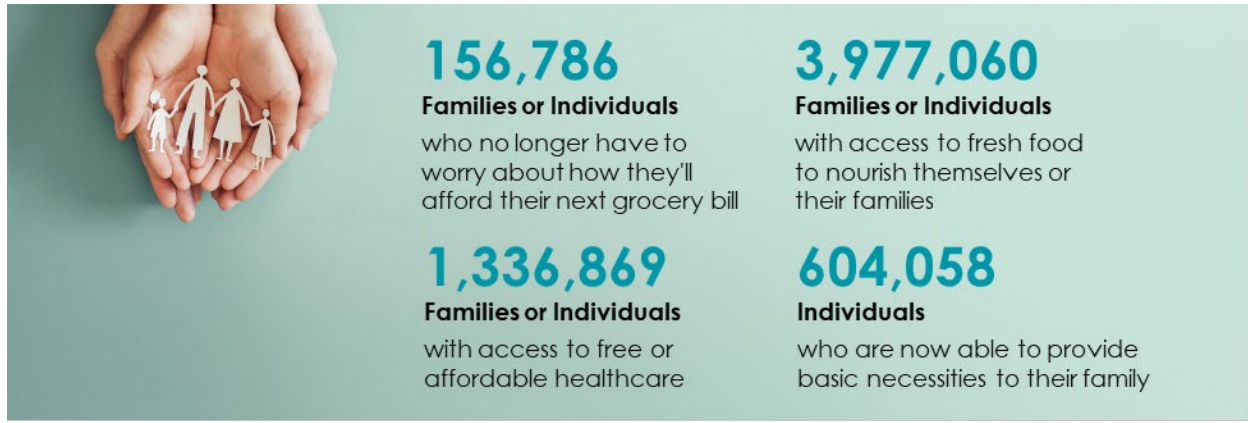
### **Public Humanized Metrics**

Over the past few years, we've shared reports on campaign successes and application adoption with our stakeholders. However, simply presenting numbers doesn't fully capture the impact of BenefitsCal. To enhance public perception and drive adoption, we transform data into engaging, humanized metrics. This involves making complex information accessible through simplified language and visual tools like infographics.

We also use personalized case studies, testimonials, and storytelling techniques to illustrate the application's real-world value and emotionally connect users to BenefitsCal. As outlined in section 4.4.3, the public-facing BenefitsCal website serves as

a platform to showcase these stories, providing stakeholders with shareable content that demonstrates the application's positive outcomes for Californians.

Figure 4.4-16 illustrates the transformation of data into compelling narratives that effectively communicate the value of BenefitsCal to stakeholders and users alike.



**Figure 4.4-16. Social Impact Metrics Humanize the Impact of Using BenefitsCal.**

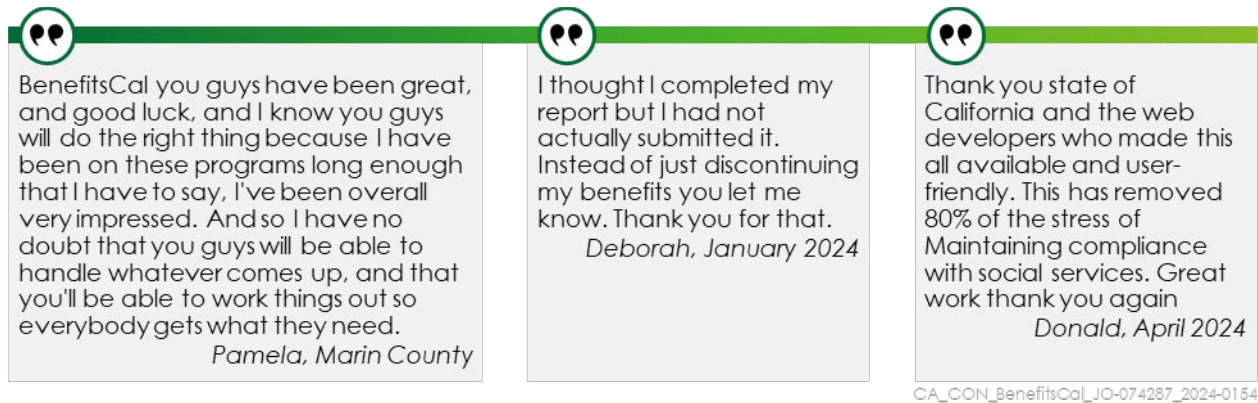
### Customer Testimonials

Enhancing the BenefitsCal narrative with customer testimonials not only supports application adoption but also positively influences stakeholder and user perceptions. Testimonials serve as a compelling storytelling tool, particularly effective in addressing concerns from individuals hesitant to share personal information with government entities or those unfamiliar with the application's complete range of services. The integration of testimonials benefits BenefitsCal by:

1. **Building Trust and Credibility:** Testimonials from satisfied users or influential stakeholders can significantly enhance the credibility of an application. They serve as endorsements on how the application can improve the life and health outcomes of a BenefitsCal user.
2. **Overcome Skepticism:** We know some of our BenefitsCal users or potential users may be skeptical about using a government application. Testimonials can help overcome this skepticism by providing authentic feedback from users who have gained real benefits from the application.
3. **Storytelling Through User Experiences:** Testimonials enhance the BenefitsCal application's appeal by showcasing real-world user experiences and improvements, making its benefits tangible and credible.
4. **Integration in Marketing Strategies:** Incorporating testimonials into marketing and stakeholder engagement strategies highlights positive user experiences, enhancing the visibility of the BenefitsCal application.
5. **Direct Communication:** Direct statements from BenefitsCal users, testimonials are uniquely impactful and should be prominently featured on websites, in public communications, marketing materials, and presentations.



Effectively leveraging testimonials can boost the perceived value and appeal of the BenefitsCal application, encouraging adoption. Figure 4.4-17 provides examples for use in stakeholder communications and marketing materials.



**Figure 4.4-17. Testimonials from BenefitsCal Users.**