

# *California Statewide Automated Welfare System (CalSAWS)*

## **County Purchase FR-01-2024 Fresno County – Request for Generative Artificial Intelligence (“AI”) for Post-Call Summarization**

## **I. Overview:**

Pursuant to Section 4.6 of Exhibit X (Maintenance and Operations (“M&O”) Extension) of the Amended Restated and Revised Leader Replacement System Agreement dated August 16, 2019 (the “Base Agreement”) between CalSAWS Consortium and Accenture LLP (“Accenture”), Fresno County (“County”) has requested Generative Artificial Intelligence (“GenAI”) for post-call summarization, as further described in this County order form (the “County Purchase”).

The capitalized terms used in this County Purchase and defined below, shall have the meaning indicated in this County Purchase. Any other capitalized terms not defined in this County Purchase will have the meaning prescribed in the Base Agreement.

- “GenAI Product” means the Amazon Web Services (“AWS”) Bedrock GenAI solution leveraged by the County and Accenture during the term of this County Purchase.
- “GenAI Output” or “Solution Output” means the content that is generated or returned through use of the GenAI Product during or as a result of this County Purchase, including in response to the queries or prompts that are submitted to the GenAI Product by the users.
- The “GenAI Artifacts” means all documentation and code created during the lifecycle of the solution.

## **II. Scope:**

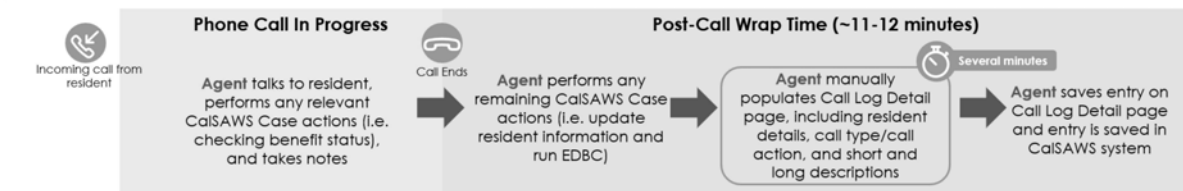
The County identified a business need for Accenture to add an AWS GenAI solution to the Customer Service Center (“CSC”) AWS architecture for generative AI-powered post-call summarization to help reduce after-call wrap time for agents/workers and standardize call notes across agents/workers. This County Purchase describes the Regulatory and Administrative (“R&A”) Change Budget Services for Accenture to implement the solution, provide access to, and support the County’s use of GenAI post-call summarization.

## Solution Overview:

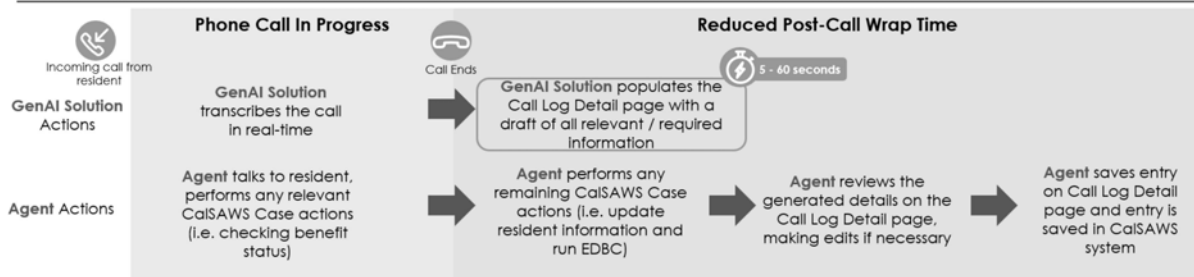
# GenAI for Post-Call Summarization Process

A GenAI-powered solution could be added to the Contact Center AWS architecture for call summarization. The solution will transcribe and summarize the call – generating call notes automatically, capturing the caller details and summary of actions performed by the agent within seconds.

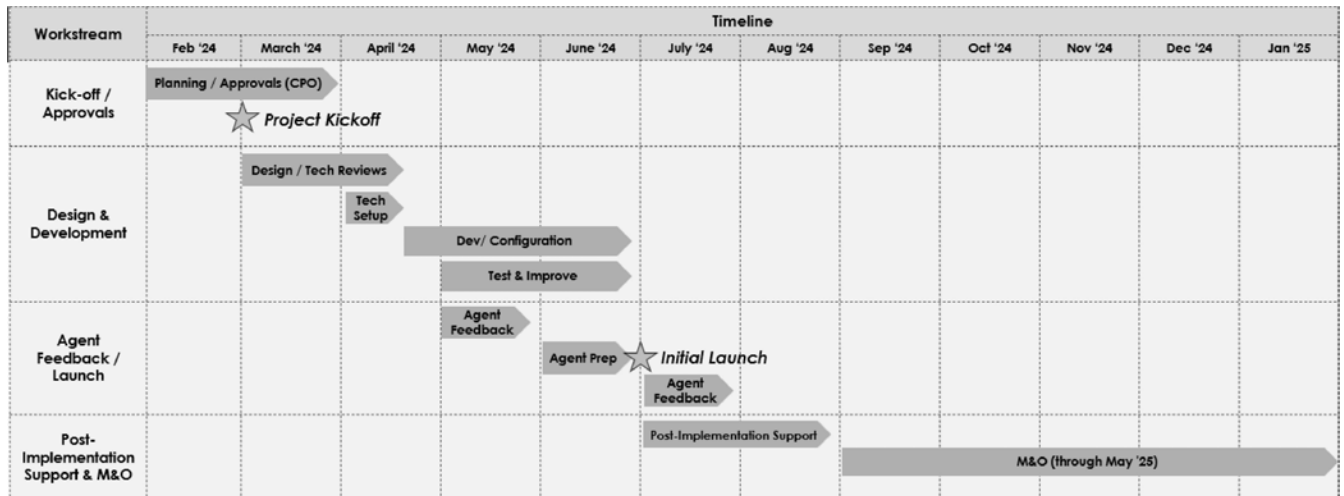
## Current State



## Future State



## Proposed Project Timeline:



The one-time R&A Change Budget Services include up to 8,693 hours to assist the County with the following:

Design – Solution Reviews/Approval:

- Create and get timely approval (within five (5) business days of request for approval) on detailed workplan, including all required approvals, activities, and agreed-upon owners;
- Accenture Security Lead provides Privacy and Security Impact Assessment to Consortium Security and Privacy Office prior to kickoff;
- Following Consortium FinOps process, Accenture submits Technical Budget Change Request (“TBCR”) with detailed AWS Service Cost for the end-to-end solution, including services in all environments;
- Define configuration requirements and customization for AWS Connect post-contact summarization powered by generative AI solution in collaboration with the County, including the following features:
  - Create standardized templates that will be used for GenAI Outputs (call summary template) containing details such as caller information, call type, call summaries, and agent/worker actions, and
  - Document solution architecture for how the solution will auto-populate and store in the CalSAWS Call Log Detail page with draft notes and summary for the agent/worker to approve before saving.
- Facilitate four (4) weeks of technical and design review discussions with County, the Consortium, and CalSAWS subject matter experts (technical architecture, CSC, ForgeRock, and Consortium Security and Cloud Architecture teams) to align on proposed architecture and answer County and Consortium questions;
  - Confirm proposed solution and architecture adheres to Consortium, County, and governing body AI policy.
- Submit all changes through Consortium Architecture Review Process, Technical Change Advisory Board (“CAB”), Change Control Board (“CCB”), FinOps, Change Request (“CR”), System Change Request (“SCR”), and TBCR processes in parallel with technical and design review discussions during the system development lifecycle;
- Document and get timely approval (within five (5) business days of request for approval) on planned technical architecture, including integration of AWS architecture with CalSAWS;
- Provide design, development, and implementation documentation of Generative AI solution (GenAI Artifacts), including a detailed data flow design, integration documentation, system design diagrams in draw.io format, security permission profile documentation, and meeting presentation materials; and
- Receive appropriate reviews and timely approvals (within five (5) business days of request for approval) from the County and Consortium FinOps and Security Architecture teams to begin technology setup by April 1, 2024.

Build/Test - Solution Configuration/Validation

- County/Consortium will provide timely approvals (within five (5) business days of request for approval) for configuration of the solution on or before April 15, 2024;
- Accenture will request AWS model access through Amazon Bedrock console for County AWS environments for technology setup by April 1, 2024;
- Build the solution enabling GenAI for County CSC post-call summarization through transcription and automatic generation of draft call notes;
- Configure AWS Connect Contact Lens for real-time transcription of calls;
- Develop up to three (3) unique GenAI prompts using AWS Bedrock to summarize call transcript (two (2) unique prompts should be sufficient for the Call Log Details page summary, plus one (1) for contingency);
- Create monitoring alerts to identify and notify team of key issues related to the AI solution;
- Test and validate the output summaries, verifying the solution functionality meets the design requirements established in the Solution

Reviews/ Approvals phase:

- ⊖ Validate solution output by comparing accuracy and after-call time of manual journal entries to the automatically generated entries and adjust model as needed (GenAI summaries will be more accurate and faster than a random sample of manual entries), and
- ⊖ Provide County with Test Plan documentation with inputs, outputs, and acceptance criteria.
- Conduct up to ten (10) County agent testing sessions to assist in validation and provide feedback (~ one, one (1)-hour-long session per week in eight (8) weeks leading up to production go-live);
  - Accenture will work with the County to prepare testing scenarios to cover key use cases,
  - Consortium will be invited to participate, and
  - The County will provide adequate sample size of agents/workers (at least ten (10) percent of total agents) for testing and feedback sessions for eight (8) weeks in May and June 2024.

Build/Test - CalSAWS Integration

- County/Consortium will provide appropriate and timely approvals (within five (5) business days of approval request) for the CalSAWS integration on or before April 15, 2024;
- Configure AWS solution and establish CalSAWS environments and databases using agreed upon technical architecture, including production and non-production (test) environments;
- Configure the solution into the existing County AWS Connect agent panel and into the existing the existing CalSAWS Call Log Details page;

- Configure and validate the CalSAWS Call Log Details page is populating a draft GenAI call summarization that the agent/worker can edit after a call is finished;
- Integrate the solution with ForgeRock for authentication;
- Develop a secure application programming interface (“API”) to integrate with CalSAWS Online application. This API will be responsible to fetch the Call summary generated by the AI solution;
- Provide access to individual users and/or service accounts within the County; and
- Follow Test Plan for validation of key scenarios, including:
  - Validate/test the CalSAWS Call Log Details page is populating the summary after a call is finished; and
  - Validate/test the new functionality does not negatively impact the existing CalSAWS Call Log Details page.

#### Change Management/Training

- Accenture team will document and conduct up to three (3) demonstration and support (“train the trainer”) sessions with the County training team to explain and walk through solution for agent/worker preparation.
- Accenture team will provide appropriate documentation and meeting materials from Solution Reviews/Approval phase to support County training team.
- The County is responsible for identifying trainers and scheduling their attendance of the “train the trainer” sessions.
- The County is responsible for creation of training materials and processes to align with the current County training protocols.
- The County is responsible for scheduling and conducting training sessions with agents; the County will confirm at least ninety (90) percent of agents attend and pass the training sessions.

#### Post-Implementation Support (eight (8) weeks of support, including functional and technical support to):

- Provide reporting to quantify impact of post-call summarization solution, including changes in average call handle time, post-call wrap time, and reported accuracy of call summaries;
- Refine GenAI prompts and GenAI Outputs based on agent/worker feedback;
- Provide up to six (6) support sessions (up to three (3) per month) and answer County worker questions regarding GenAI solution;
- County trainers will assist with on-site support sessions and ongoing agent/worker questions; and
- Maintain AWS environments, including security upgrades.

This County Purchase also includes R&A Change Budget Services of up to 320 hours for administration of the County Purchase order. This includes the management of

the County Purchase work plan, coordination with CalSAWS teams and the County, tracking of the County Purchase progress, and providing status updates.

This County Purchase includes up to 442 hours per month for recurring R&A Change Budget Services for monitoring the solution, performance reporting as needed, and providing support for changes that affect the GenAI AWS solution as follows:

- Provide ongoing maintenance of GenAI environments, including upgrades and security vulnerabilities,
  - Includes Lambda runtime upgrades and Lambda vulnerability remediation;
- Provide infrastructure support for Amazon Web Services (“AWS”) issues, configuration, and Technical Operations support or changes that are required as part of the CalSAWS process or identified by the County or CalSAWS;
- Provide GenAI development support to make enhancements to support prompt improvements;
- Provide ongoing reporting and tracking of issues with call summarization solution, including key performance indicators and any open issues and risks;
- Provide functional support for reviewing evolving GenAI regulations and requirements and tracking changes that are required; and
- Provide functional support for ongoing offline (email) troubleshooting support; ongoing reviews of performance; and reporting/dashboards and leadership status updates.

This County Purchase also includes recurring R&A Change Budget Services of up to six (6) hours per month for administration of the County Purchase order. This includes the management of the County Purchase work plan, coordination with CalSAWS teams and the County, tracking of the County Purchase progress, and providing status updates.

The scope of this County Purchase includes the following:

- One-Time R&A Change Budget Services
- Recurring R&A Change Budget Services

### **III. Assumptions:**

- The charges set forth in Section V below (the “Total Charges”) are based on the scope of work outlined in this County Purchase. Any changes in scope, including new or out-of-the-box AWS services, must be mutually agreed upon by Accenture, reviewed and approved by Consortium and the County in writing and may result in additional charges. These additional charges will be executed as a revision to this County Purchase.

- Accenture staff will begin the work effort on March 4, 2024, or upon receipt of written confirmation from the County expressing their agreement with the County Purchase, whichever is later. Accenture staff may pause work if the County Purchase is not fully executed by March 31, 2024. In the event the execution of the County Purchase is delayed beyond the abovementioned date, Accenture and the County will work together to adjust the proposed project timeline and funding across State Fiscal Years (“SFYs”).
- In the event there are County dependencies that are unable to be met and require schedule and/or funding shift changes, the parties will mutually agree to amend/revise the County Purchase.
- One-Time R&A Change Budget Services will be worked and invoiced on a time and materials (“T&M”) basis up to a maximum of 8,693 hours. Invoices for such charges will be submitted to the Consortium monthly in arrears, and the Consortium will, in turn, invoice the County. The County will be invoiced for actual hours worked.
  - Up to 4,708 hours will be worked and invoiced in SFY 2023/24, estimated to continue through the end of the SFY 2023/24, May 31, 2024.
  - Up to 3,985 hours will be worked and invoiced in SFY 2024/25, estimated to commence June 1, 2024. Such hours may be worked and invoiced through the end of SFY 2024/25, May 31, 2025.
  - If the County requests offshore/onshore staffing mix changes, then a revision to this County Purchase would be required.
  - Accenture and County will monitor the hours for R&A Change Budget Services and discuss the addition of more hours with the County if necessary. Any additional hours required for R&A Change Budget Services would result in additional charges. These additional charges would be provided to the County in a separate County Purchase.
- Recurring R&A Change Budget Services are included in this County Purchase for Accenture to assist the County with providing post-call summarization. Recurring R&A Change Budget Services will be worked and invoiced on a T&M basis and are estimated to commence September 1, 2024 and continue through the end of SFY 2024/25, May 31, 2025. These charges are based on an estimate of 448 hours of support per month.
  - Up to 4,032 hours will be worked and invoiced in SFY 2024/25, estimated to commence June 1, 2024 and continue through May 31, 2025. If the County requests more hours for SFY 2024/25 or SFY 2025/26, a revision to this County Purchase would be required.
  - If the County requests offshore/onshore staffing mix changes, then the request must be approved by Consortium Privacy and Security Officers and a revision to this County Purchase would be required.
  - The Consortium, Accenture and County will monitor the hours for Recurring R&A Change Budget Services and discuss the addition of more hours with the County if necessary. Any additional hours



required for Recurring R&A Change Budget Services would result in additional charges. These additional charges would be provided to the County in a separate County Purchase. If a CalSAWS change impacts this County Purchase so that the work effort needed to adapt the post-call summarization exceeds the budget in this County Purchase, a separate County Purchase would be required.

- Accenture will work with the County and the Consortium staff to support project activities throughout the term of this County Purchase.
- Accenture will bring qualified staff with experience in the solution who will perform the Work described in this County Purchase, in accordance with the staffing plan provided. Accenture will provide resumes to the Consortium for review.
- The County will be responsible for assigning a County contact for security activities, such as access requests to the County's AWS account or security incidents.
- Accenture will configure and validate the solution for summaries of calls in English language for initial launch. Additional supported languages will be considered for future implementations.
- Access credentials will be rotated by County in accordance with Consortium Security Policy.
- This County Purchase does not include any incremental charges for network infrastructure. If future changes to the CalSAWS System impact this County Purchase and would result in the need for additional network infrastructure costs, these additional charges would be provided to the County in a separate County Purchase.
- The work described in this County Purchase will be performed virtually/remotely.
- The County must (1) approve this County Purchase and (2) provide the corresponding approved Advance Planning Document ("APD") or alternative form of authorized spending from the Office of Technology and Solutions Integration ("OTSI") that supports this purchase by March 31, 2024 to proceed with this purchase. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.

AWS Cost/Architecture-Related Assumptions:

- The Total County Purchase Charges do not include charges for AWS compute resources and services required for enhancements that will be deployed under this County Purchase. An estimate of AWS compute resources and services costs is provided to the County for budget allocation purposes. The Consortium will be fully responsible for making such resources and services available for supporting the project, including the procurement and payment for such services from AWS. The County will be responsible for reimbursing the Consortium for all AWS charges required to

support the solution. The estimate for AWS compute resources charges is based on services for SFYs 2023/24 and 2024/25.

- The County will be responsible for obtaining access to County datasets from the Consortium.
- The County will be responsible for the AWS costs associated with storage of the data from the GenAI post-call summarization. These costs will vary based on data volume.
- AWS cost estimates are subject to change based on outcomes of technical architecture reviews and approvals process.
- AWS cost estimates account for services in three (3) AWS environments (one (1) production, two (2) non-production).
- In the event of an emergency and the solution is not working as expected in the production environment, County workers will be informed via outages broadcasts of the outage and users will need to revert to manual entry of summaries until service is restored.
  - Call recordings will continue to be stored according to existing CSC procedures.
- AWS cost estimates are case on call volume estimates from County call data from September 2023 – January 2024 (~ eight (8) minutes of talk time per call, ~30,000 calls per month). Non-production estimates were ~ten (10) percent of expected production volumes.
- AWS Contact Lens will be used in the backend transcription component of the solution. The AWS Contact Lens console will not be configured for County use in this agreement, but it can be provisioned for County use after further Consortium reviews and configuration.
- While the Total Charges for the scope include estimates for Services, Hardware, Software, and/or AWS Charges required to implement this work, the Hardware, Software, and AWS estimates are based on charges from vendors as of the current submission date. At the time of contracting, these rates or costs may change. It is assumed that the Consortium will procure the hardware and software required and will budget the applicable AWS. AWS costs are included in and defined in Attachment 1 to County Purchase FR-01-2024 – Pricing Schedules.

Solution-Related Assumptions:

- The County agrees that the Solution Output and any documents and reports that will be delivered by Accenture to the County as part of this County Purchase, shall be used solely for the Scope.
- Accenture is responsible for adhering to the CalSAWS AI policy. The Consortium will accept the AWS Solution terms and conditions.
- The Consortium/County shall be responsible for business validation of the following: (a) using the Solution Outputs; (b) deciding if the Outputs meet the requirements.

- Accenture Services pertaining to this solution will meet the business and technical requirements and will be subject to provisions defined in Exhibit X (CalSAWS M&O Extension) of the Base Agreement, including but not limited to:
  - 11.1 CalSAWS SYSTEM WARRANTY
  - 11.2 WARRANTY WORK
  - 11.3 CORRECTION OF DEFICIENCIES
  - 11.4 WARRANTY WORK RESPONSE and the Deficiency Management Plan in the Project Control Document (“PCD”).
  - 16.1 INDEMNIFICATION
- The AWS Software including the “GenAI Product” and the “GenAI Output” are excluded from the warranty and indemnification provisions.
- For clarity, for the purposes of this County Purchase, Section 22 PROPRIETARY CONSIDERATIONS of Exhibit X (CalSAWS M&O Extension) of the Base Agreement shall apply.
- The Performance Requirements set forth in Schedule 7 (Performance Requirements) to Exhibit X (CalSAWS M&O Extension) of the Base Agreement will not apply to this County Purchase.
- Key Performance Indicators (“KPIs”) (from AWS solution) will be reported out to the Consortium/County on a recurring basis, including: 1) the call summary generation time (expected within sixty (60) seconds of call end), 2) Average after-call wrap time (expected reduction greater than one (1) minute compared to pre-launch baseline), and 3) agent acceptance/usage of the tool.

**IV. Schedule:**

The charges associated with this County Purchase will be incurred during SFYs 2023/24 and 2024/25.

**V. Total Charges:**

The following table outlines the total charges for this County Purchase.

Total County Purchase Charges	SFY 23/24	SFY 24/25	Total Charges
One-Time R&A Change Budget Services	\$769,574.44	\$615,824.48	\$1,385,398.92
Recurring R&A Change Budget Services	\$0.00	\$577,704.06	\$577,704.06
Hardware and Software Charges	\$0.00	\$0.00	\$0.00
Hardware Charges	\$0.00	\$0.00	\$0.00
Hardware Maintenance and Support Charges	\$0.00	\$0.00	\$0.00
Software Charges	\$0.00	\$0.00	\$0.00
Software Maintenance and Support Charges	\$0.00	\$0.00	\$0.00
Production Operations Charges	\$0.00	\$0.00	\$0.00
One Time Charges	\$0.00	\$0.00	\$0.00
Recurring Charges	\$0.00	\$0.00	\$0.00
Total Charges	\$769,574.44	\$1,193,528.54	\$1,963,102.98

**VI. Attachment 1 to the County Purchase FR-01-2024 – Pricing Schedules**

COUNTY PURCHASE APPROVAL

Subject: County Purchase - FR-01-2024

The subject document is accepted as allowing Accenture LLP to proceed with the subject County Purchase.

Fresno County

By: [Signature]

Printed Name: Nathan Magsig

Title: Chairman of the Board of Supervisors

Date: 3-19-2024

ATTEST:

BERNICE E. SEIDEL

Clerk of the Board of Supervisors

County of Fresno, State of California

By: [Signature] Deputy

Approved as to Form:

Fresno County Counsel

By: [Signature]

Printed Name: Heather Knuthers

Title: Chief Deputy County Counsel

Date: 3/6/24

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FOR ACCOUNTING USE ONLY:

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CalSAWS Consortium

By: Holly Murphy  
Holly Murphy (Mar 27, 2024 10:05 PDT)

Printed Name: Holly Murphy

Title: CalSAWS PMO Director

Date: Mar 27, 2024

Accenture LLP

By: Arnold J. Malvick  
Arnold J. Malvick (Mar 26, 2024 09:31 PDT)

Printed Name: Arnold J. Malvick

Title: Accenture Project Executive

Date: Mar 26, 2024

Notice Address:

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