JPA Board of Directors Meeting
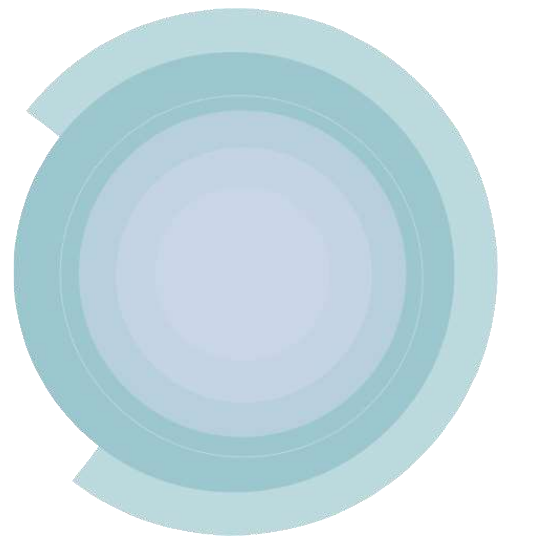
May 9, 2025

CalSAWS

Agenda

1. Call Meeting to Order.

2. Confirmation of Quorum and Agenda Review.

3. Public Comment: Public opportunity to speak on any item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

   Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

Action Items

Action Items
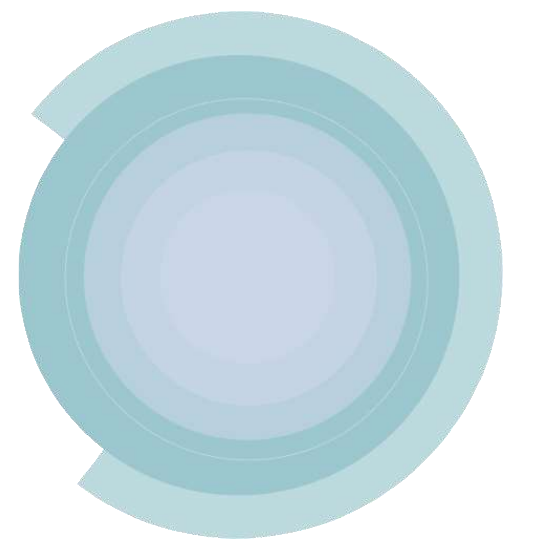
4. Approval of Resolution recognizing Lynn Bridwell upon her retirement

5. Approval of contract extension with the California Welfare Directors Association (CWDA) for a six-month period.

M&E and Infrastructure Amendments
Background

Scope Shifts

- To support efficiency and risk management we are shifting the Contact Center and Identity Access Management applications from the M&E vendor to Infrastructure. This transition will enable more streamlined maintenance, as the current applications do not support multi-vendor maintenance without significant redesign

- Gainwell assumed responsibility for the core infrastructure in February and will assume responsibility for the remainder of infrastructure plus the application components by June

Updates to Transition Plan

- M&E transition will take place in phases instead of all at once

- Accenture staff will ramp down earlier, and Deloitte staff will ramp up earlier than planned

- Deloitte to assume responsibility for CalHEERS design in May and design for Release 25.11 in June, design for 26.01 to begin in August

- All Service Level Agreements will go into effect in November with the Release

- Accenture will provide "back-shadow" support post cutover through end of January 2026 subject to pending Amendment 33

Updates to In-Flight & New Projects

- Technical and Security Upgrades in process or planned must transition to the new contracts

- Ongoing CDSS and DHCS Report support was not originally accounted for but will transition to Deloitte on February 1, 2026

- Recurring infrastructure support for WDTIP was not originally accounted for but will transition to Gainwell in May

- The Northern California central depot was consolidated with the new project site in Gold River and results in savings

Deloitte Amendment 1
Cost Summary

- Includes earlier staff ramp up
- Adds recurring CDSS/DHCS report support
- Adds in-flight technical/security upgrades
- Offset with reduction to Contact Center scope
- No overall impact to Total Contract Value with shift from the Change Allowance

| CalSAWS M&E Overall Price Total	Amendment 1	Original	Difference
M&E Transition-In Deliverables	$1,758,111	$1,758,111	$0
M&E Base Deliverables	$14,259,541	$14,259,541	$0
M&E Database Migration Price	$9,328,090	$9,328,090	$0
M&E Software Price	$2,141,412	$2,141,412	$0
M&E Services: February 2026 - January 2032	$323,103,820	$313,945,851	$9,157,969
M&E Other Price	$600,000	$600,000	$0
Sub-Total	**$351,190,974**	**$342,033,005**	**$9,157,969**
Change Allowance/County Purchase Allowance	**$80,842,031**	**$90,000,000**	**($9,157,969)**
Total Base	**$432,033,005**	**$432,033,005**	**$0**

Gainwell Amendment 1
Cost Summary

- Adds Contact Center M&E scope
- Adds Identity Access Management M&E scope limited term until future upgrade
- Adds WDTIP infrastructure support
- Adds in-flight technical/security upgrades
- Offset by reduction due to consolidation of Northern California central depot
- No overall impact to Total Contract Value with shift from the Change Allowance

CalSAWS Infrastructure Overall Price Total	Amendment 1	Original	Difference
Infrastructure Transition-In Deliverables	$3,765,068	$3,765,068	$0
Infrastructure Base Deliverables	$8,668,071	$8,668,071	$0
Infrastructure Hardware Price	$73,583,778	$73,583,778	$0
Infrastructure Software Price	$147,522,654	$147,522,654	$0
Infrastructure Telecom Price	$18,993,921	$18,993,921	$0
Infrastructure Services: August 2024 - January 2031	$240,781,993	$222,821,305	$17,960,688
Infrastructure Imaging Price	$75,898,122	$75,898,122	$0
Infrastructure Other Price	$3,944,807	$5,423,898	($1,479,091)
Sub-Total	**$573,158,414**	**$556,676,817**	**$16,481,597**
Change Allowance/County Purchase Allowance	**$33,518,403**	**$50,000,000**	**($16,481,597)**
Total Base	**$606,676,817**	**$606,676,817**	**$0**

Action Items
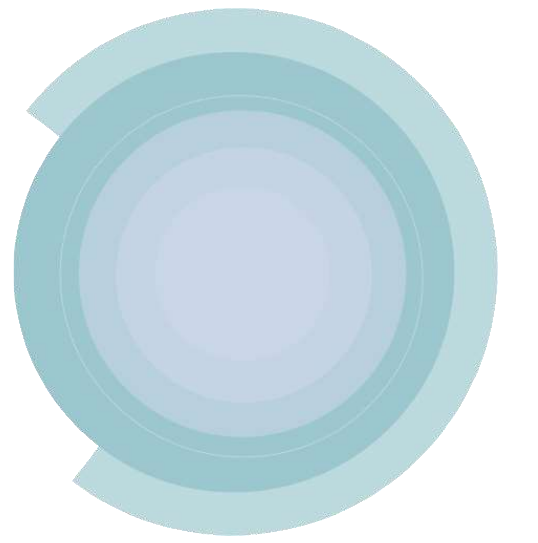
6. Approval of Deloitte Amendment 1, which includes alignment of scope between Infrastructure and M&E and alignment of the transition schedule.

7. Approval of Gainwell Amendment 1, which includes alignment of scope between Infrastructure and M&E.

Action Items
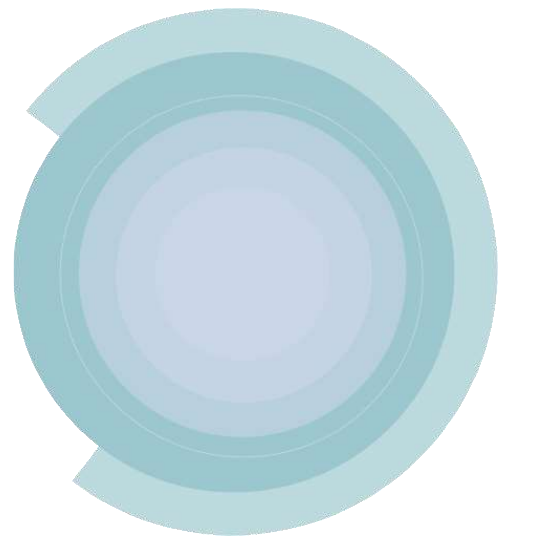
8. Approval of Consent Items:

    a. Approval of the Minutes and review of the Action Items for the April 9, 2025, JPA Board of Directors Meeting.

    b. Approval of Accenture Change Notice 40, which includes M&E transition scope of work, county purchases, and administrative updates.
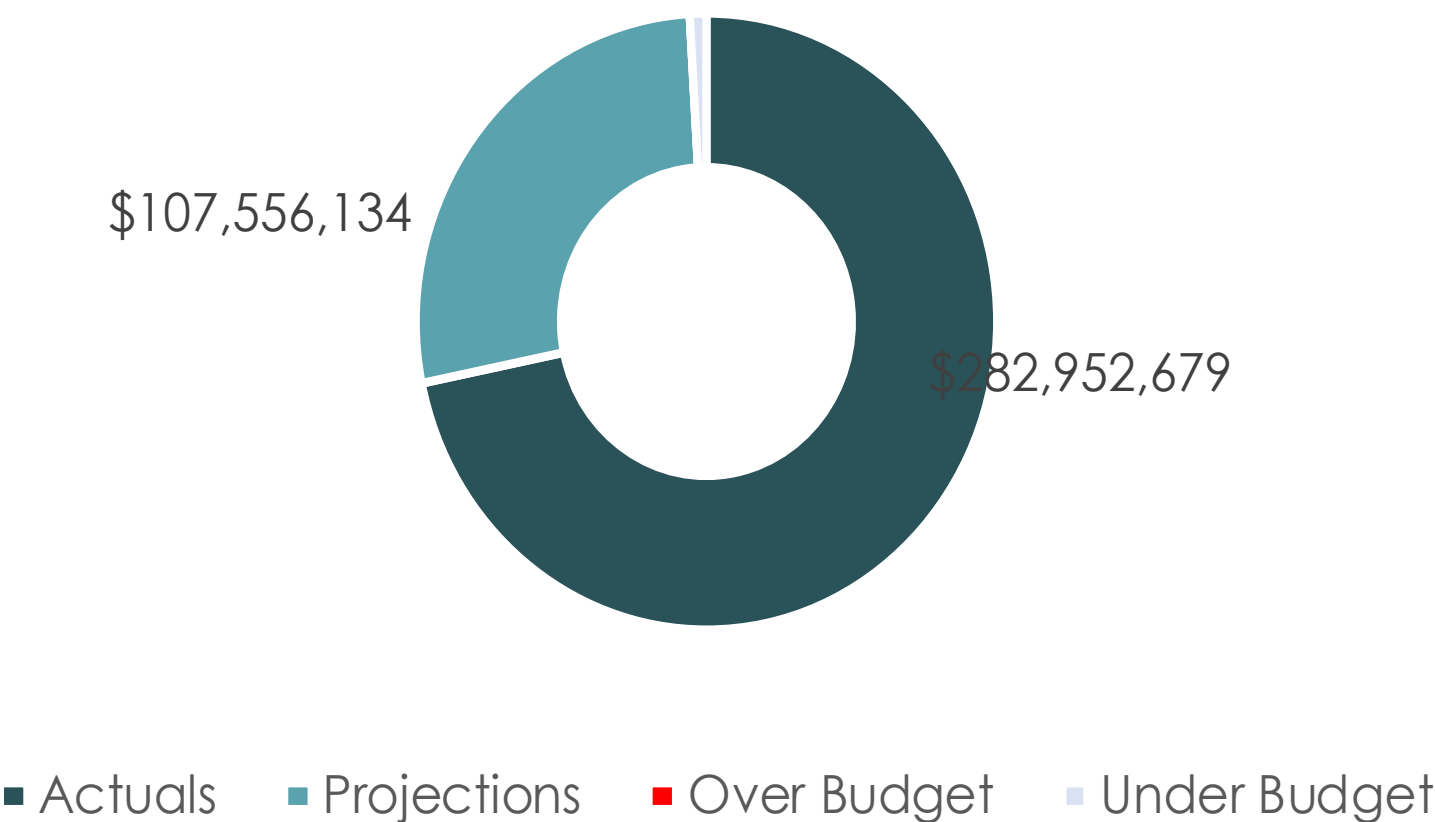
Informational Items

Quarterly Fiscal Report

CalSAWS | JPA Board of Directors

CalSAWS Financial Update

CalSAWS M&O

Premise

JPA Admin
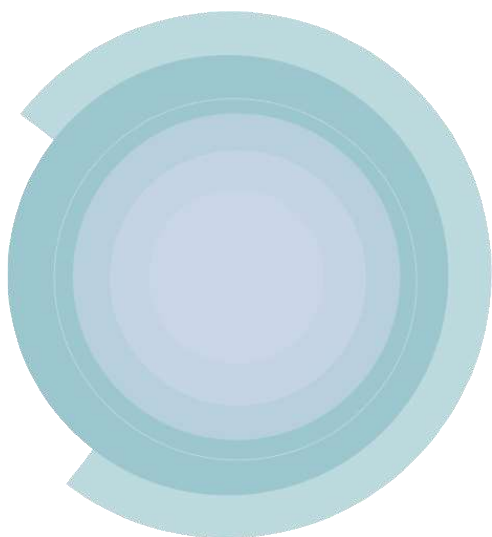
1 Actuals to Date
Based on Vendor Invoices & County Claims

2 Projections (Estimates to Complete)
Estimated Costs for Future Months

3 Estimate at Completion (EAC)
Actual Costs Plus Estimated

4 Total Allocation/Budget
Amount Allocated by Line Item for the Approved Budget

5 Balance
Difference Between EAC and Budget
Negative balance is over budget
Positive balance is under budget

6 % Expended to Date (Actuals)
Percent of Actuals to Date Divided by the Budget

7 % EAC to Budget
Percent of EAC Divided by the Budget

CalSAWS | SFY 2024/25 FINANCIAL DASHBOARD - May 2, 2025

Total Actuals & Projections

$107,556,134

$282,952,679

■ Actuals ■ Projections ■ Over Budget ■ Under Budget

% Expended to Date

CalSAWS: 72% | 27%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Actuals ■ Projections ■ Over Budget ■ Under Budget
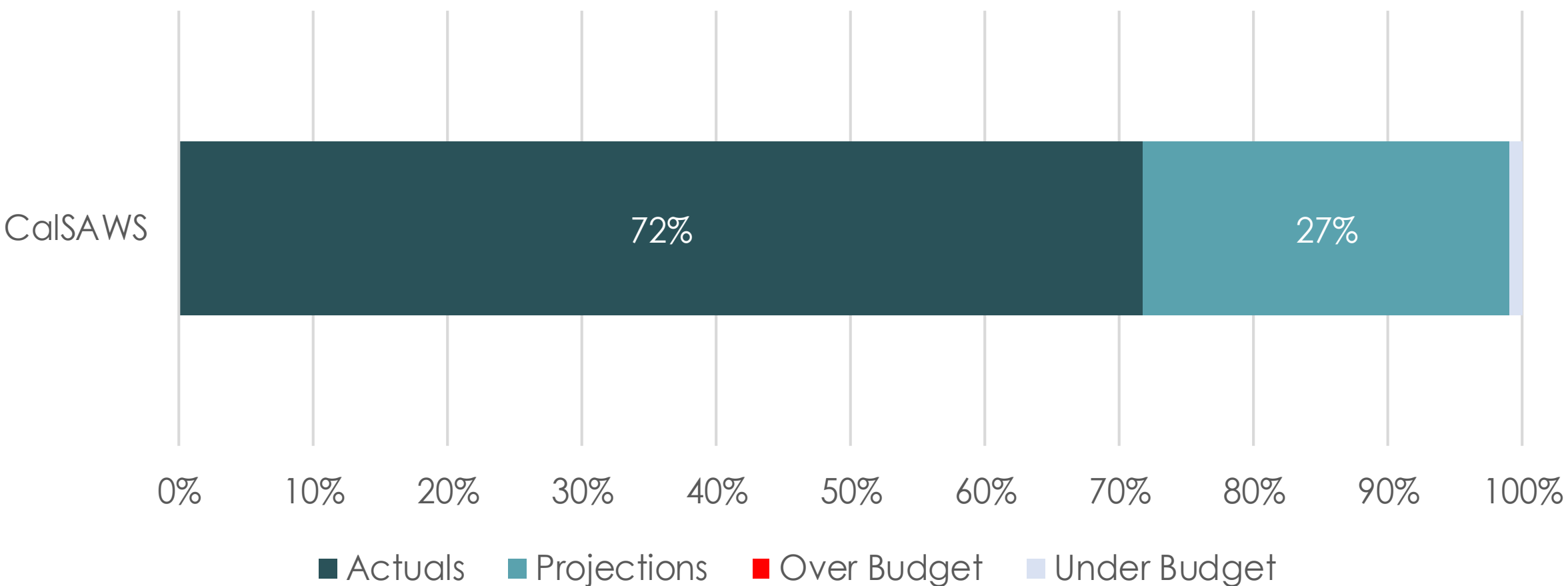
Category	Actuals to Date[1]	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	**$248,511,888**	**$95,311,541**	**$343,823,430**	**$344,652,952**	**$829,522**	**72.1%**	**99.8%**	
CalSAWS M&O	$241,214,720	$94,533,577	$335,748,298	$336,019,642	$271,344	71.8%	99.9%	
M&O Procurement	$507,274	$144,666	$651,940	$778,680	$126,740	65.1%	83.7%	
OCAT M&O	$1,242,921	$30,214	$1,273,135	$1,543,250	$270,115	80.5%	82.5%	Actual costs less than planned
CalHEERS Interface	$4,388,447	$466,055	$4,854,502	$4,889,004	$34,502	89.8%	99.3%	
Covered CA CSC	$1,158,526	$137,029	$1,295,555	$1,422,376	$126,821	81.5%	91.1%	
CalSAWS Premise	**$33,919,158**	**$12,050,241**	**$45,969,399**	**$48,775,658**	**$2,806,259**	**69.5%**	**94.2%**	
CalSAWS Premise	$33,919,158	$12,050,241	$45,969,399	$48,775,658	$2,806,259	69.5%	94.2%	Actual costs less than planned
JPA Admin. Budget	**$521,633**	**$194,351**	**$715,984**	**$715,984**	**$0**	**72.9%**	**100.0%**	
CalSAWS 58 Counties	$521,633	$194,351	$715,984	$715,984	$0	72.9%	100.0%	
Total	**$282,952,679**	**$107,556,134**	**$390,508,813**	**$394,144,594**	**$3,635,781**	**71.8%**	**99.1%**	

1. Actuals are based on planned invoices through May (partial) payment month

CalSAWS | SFY 2024/25 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS M&O	**$24,616,437**	**$5,397,154**	**$30,013,591**	**$30,388,019**	**$374,428**	**81.0%**	**98.8%**
Consortium Personnel - County[1]	$7,410,056	$2,812,270	$10,222,326	$10,222,326	$0	72.5%	100.0%
Consortium Personnel - Contractor[2,3]	$17,206,381	$2,584,884	$19,791,265	$20,165,693	$374,428	85.3%	98.1%
Premise	**$0**	**$0**	**$0**	**$0**	**$0**	**0.0%**	**0.0%**
Consortium Personnel - County[1]	$0	$0	$0	$0	$0	0.0%	0.0%
Consortium Personnel - Contractor[2,3]	$0	$0	$0	$0	$0	0.0%	0.0%
Total	**$24,616,437**	**$5,397,154**	**$30,013,591**	**$30,388,019**	**$374,428**	**81.0%**	**98.8%**

SFY 2024/25 - Consortium Personnel FTE Counts		FTE
CalSAWS M&O Long-Term		**148**
Consortium Personnel - County[1]		53
Consortium Personnel - Contractor[2]		85
Consortium Personnel - Sub-Contractor[3]		7
TBD[4]		3
CalSAWS Transition Limited-Term		**7**
Consortium Personnel - County[1]		0
Consortium Personnel - Contractor[2]		5
Consortium Personnel - Sub-Contractor[3]		0
TBD[4]		2
Total		**155**

[1]Includes only Consortium Staff, does not include County Support Staff

[2]Includes RGS and CSAC employees

[3]Includes RGS Contractor Staff

[4]Vacancies

CalSAWS | SFY 2024/25 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS M&O	**$67,909,955**	**$14,052,081**	**$81,962,036**	**$83,100,449**	**$1,138,413**	**81.7%**	**98.6%**
CalSAWS M&E	$31,194,651	$5,528,425	$36,723,076	$36,723,076	$0	84.9%	100.0%
CalHEERS Interface Change Budget	$2,892,907	$273,137	$3,166,044	$3,166,044	$0	91.4%	100.0%
BenefitsCal	$3,417,936	$245,722	$3,663,658	$3,663,658	$0	93.3%	100.0%
CalSAWS Premise	$30,404,461	$8,004,797	$38,409,258	$39,547,671	$1,138,413	76.9%	97.1%
TOTAL	**$67,909,955**	**$14,052,081**	**$81,962,036**	**$83,100,449**	**$1,138,413**	**81.7%**	**98.6%**

Application Maintenance
Hours by Service Month
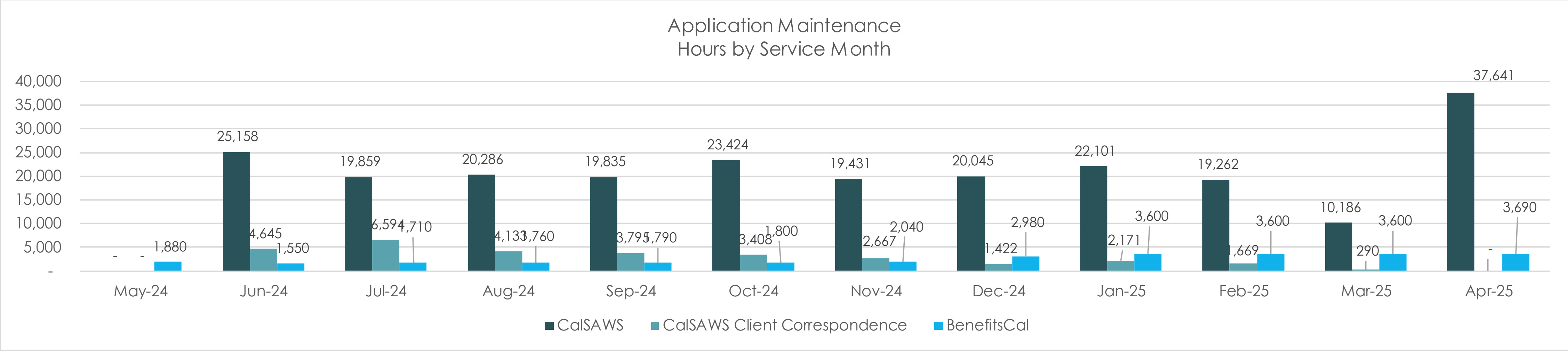
Service Month	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	Total
CalSAWS M&O	**-**	**25,158**	**19,859**	**20,286**	**19,835**	**23,424**	**19,431**	**20,045**	**22,101**	**19,262**	**10,186**	**37,641**	**237,228**
Design & Build	-	10,789	8,211	7,768	8,613	9,653	9,465	9,765	10,746	8,515	1,916	-	85,441
Test	-	5,045	3,229	3,596	2,639	3,374	2,704	3,175	3,681	3,612	1,790	-	32,845
Management & Other Support	-	9,324	8,419	8,922	8,583	10,397	7,262	7,105	7,674	7,135	6,480	-	81,301
Projection	-	-	-	-	-	-	-	-	-	-	-	37,641	37,641
CalSAWS Client Correspondence	**-**	**4,645**	**6,594**	**4,133**	**3,795**	**3,408**	**2,667**	**1,422**	**2,171**	**1,669**	**290**	**-**	**30,794**
Client Correspondence	-	4,645	6,594	4,133	3,795	3,408	2,667	1,422	2,171	1,669	290	-	30,794
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-
BenefitsCal	**1,880**	**1,550**	**1,710**	**1,760**	**1,790**	**1,800**	**2,040**	**2,980**	**3,600**	**3,600**	**3,600**	**3,690**	**30,000**
Design & Build	1,035	852	941	968	985	992	1,122	1,641	1,980	1,981	1,981	-	14,478
Test	469	388	427	440	447	448	510	743	900	899	899	-	6,570
Management & Other Support	376	310	342	352	358	360	408	596	720	720	720	-	5,262
Projection	-	-	-	-	-	-	-	-	-	-	-	3,690	3,690
COMBINED TOTAL	**1,880**	**26,708**	**21,569**	**22,046**	**21,625**	**25,224**	**21,471**	**23,025**	**25,701**	**22,862**	**13,786**	**41,331**	**267,228**

NOTES:

May Services for CalSAWS M&O and Client Correspondence were paid in June and therefore reflected in prior year report.

CalSAWS includes offshore "no-cost" hours.

Excludes CalHEERS and Premise hours.

5/25 Update: Client Correspondence update applied as reconciliation. CalSAWS hours for April include May services. March CalSAWS hours account for premise reconciliation with Alt Format and CHDP.

16

CalSAWS | SFY 2024/25 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail				
Category	**Service Month**	**Amount**	**Invoice Month**	**Invoice #**
Hyland	April-24	$79,564	October-24	1101026055
Hyland	July-24	$79,564	October-24	1101026055
Hyland	August-24	$79,564	December-24	1101046795
CalSAWS System Daily Peak Usage Hour Availability	May-24	$10,000	September-24	1101021357
CalSAWS System Daily Peak Usage Hour Availability	May-24	$10,000	September-24	1101021357
CalSAWS System Daily Peak Usage Hour Availability	June-24	$10,000	October-24	1101026694
CalSAWS System Daily Peak Usage Hour Availability	October-24	$10,000	December-24	1101046638
Hyland	December-24	$159,127	March-25	1101061317
Incident Notification Time	December-24	$5,000	March-25	1101062249
Total		**$442,819**		

Accenture Change Notices	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 32)	**$167,000,000**	
Previously Approved through June 2022	$79,433,282	FIVE - THIRTY
Various Premise Items and Reconciliation to Actual Costs	$948,661	THIRTY ONE
Various Premise Items, Security and Technical Updates	$4,980,254	THIRTY TWO
Various Premise Items	$30,177,374	THIRTY-THREE
Various Premise Items	$2,308,378	THIRTY-FOUR
Various Premise Items	$429,638	THIRTY-SIX
CDSS Reports	$229,680	THIRTY-EIGHT
CDSS Reports	$2,855,048	THIRTY-NINE
Total Allocated Amounts	**$121,362,315**	
Total Remaining Allocation	**$45,637,685**	

Accenture County Purchases	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 32)	**$35,000,000**	
Approved County Purchases	$23,627,113	FIFTEEN - THIRTY NINE
Approved County Purchases	$896,042	FORTY*
Total Allocated Amounts	**$24,523,155**	
Total Remaining Allocation	**$10,476,845**	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 8)	**$8,829,000**	
Various Premise Items	$593,134	CO 8 ONE - THREE
Various Premise Items	$3,458,325	CO 8 FOUR - FIVE - NINE
Various Premise Items	$322,072	CO9 TWO
Total Allocated Amounts	**$4,373,531**	
Total Remaining Allocation	**$4,455,469**	

Gainwell Infrastructure Change Notices/County Purchases	Total Amount	Contract Ref.
Total Baseline Allocation (Amendment ONE)*	**$33,518,403**	
Total Allocated Amounts	**$0**	
Total Remaining Allocation	**$33,518,403**	

Gainwell Central Print	Total Amount	Change Order Ref.
Total Baseline Allocation	**$9,000,000**	
Approved County Purchases	$229,515	ONE-TWO
Total Allocated Amounts	**$229,515**	
Total Remaining Allocation	**$8,770,485**	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 8)	**$33,000,000**	
Various Premise Items	$9,367,413	ONE - FOURTEEN
Get CalFresh Parity	$3,150,297	FIFTEEN
Various Premise Items	$158,843	SIXTEEN
ABAWD	$800,000	SEVENTEEN
Various Premise Items	$312,950	EIGHTEEN
Total Allocated Amounts	**$13,789,503**	
Total Remaining Allocation	**$19,210,497**	

Deloitte M&E	Total Amount	Contract Ref.
Total Baseline Allocation (Amendment ONE)*	**$60,842,031**	
Total Allocated Amounts	**$0**	
Total Remaining Allocation	**$60,842,031**	

Deloitte M&E County Purchases	Total Amount	Contract Ref.
Total Baseline Allocation	**$20,000,000**	
Various Premise Items		
Total Allocated Amounts	**$0**	
Total Remaining Allocation	**$20,000,000**	

*Pending Board Approval

Quarterly Performance & SLAs Report

CalSAWS Quarterly Statistics
CalSAWS Application Release Quality Metrics

Release x CoR

Chart showing Release x CoR with Red Range, Yellow Range, and Green Range bands. Data points labeled: 1.7%, 2.4%, 4.0%, 1.0%, 1.0%, 1.0%, 1.6% across releases 24.01, 24.03, 24.05, 24.07, 24.09, 24.11, 25.01.

Legend: Onshore + Offshore | Offshore | Onshore
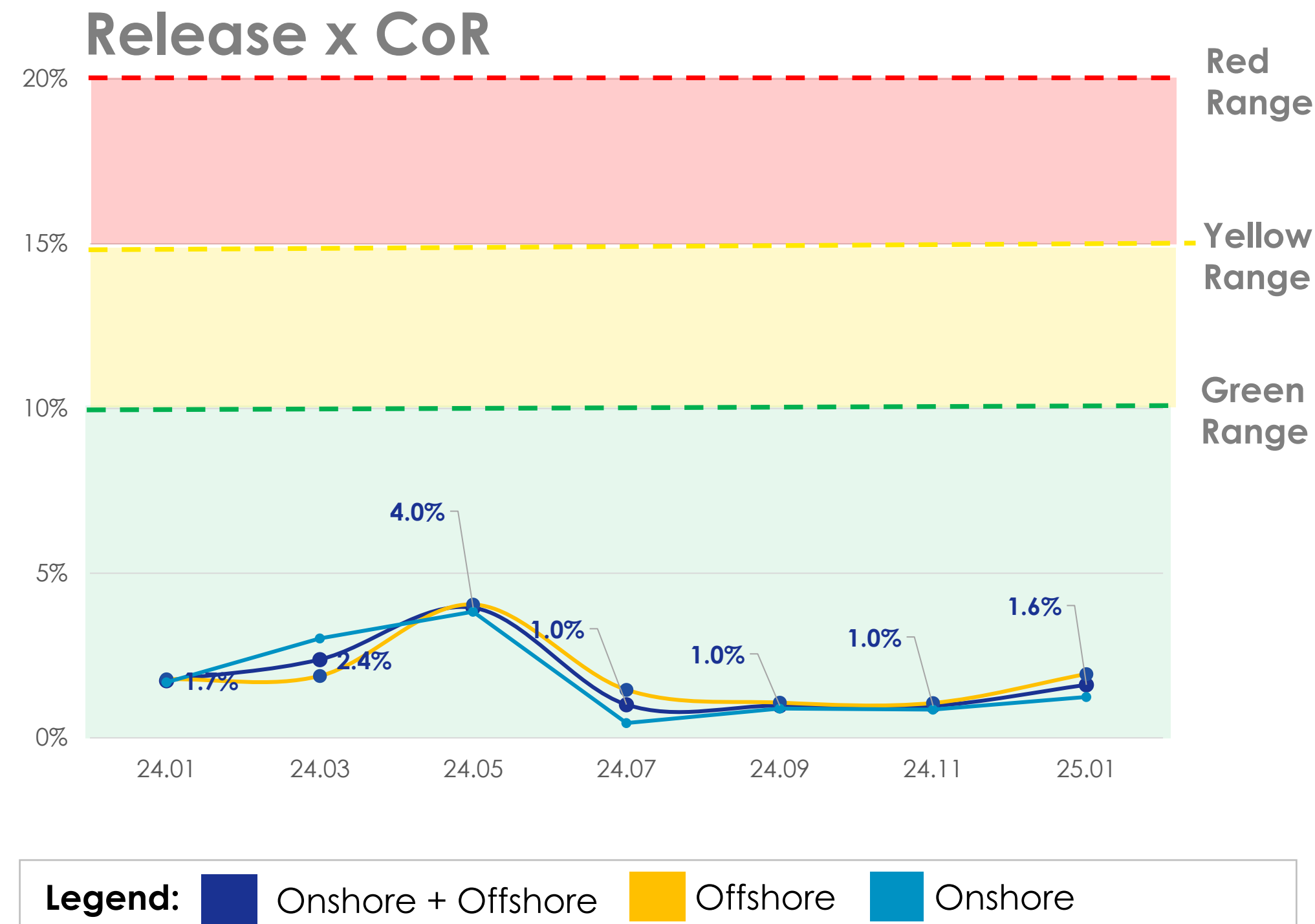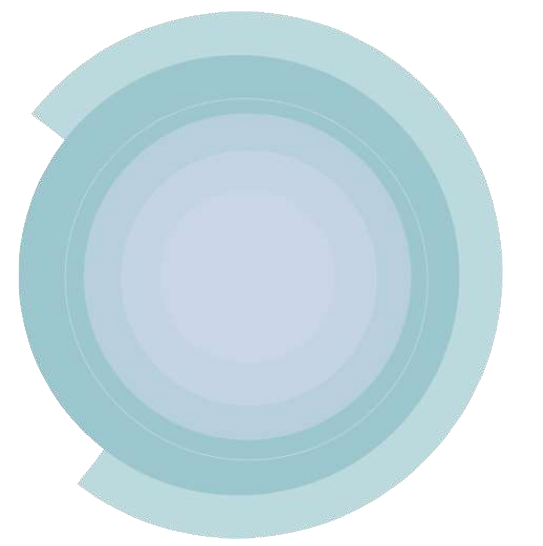
TYPICAL RANGES
GREEN: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.
AMBER/**RED**: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

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

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

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

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 25.03 COR numbers will be available after 25.05 goes live

# CalSAWS Quarterly Metrics

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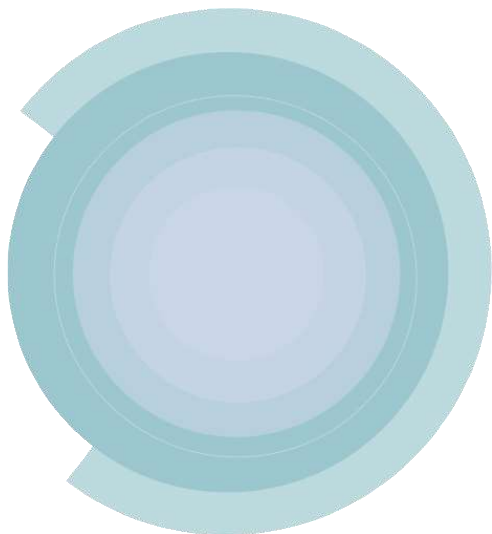
Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges

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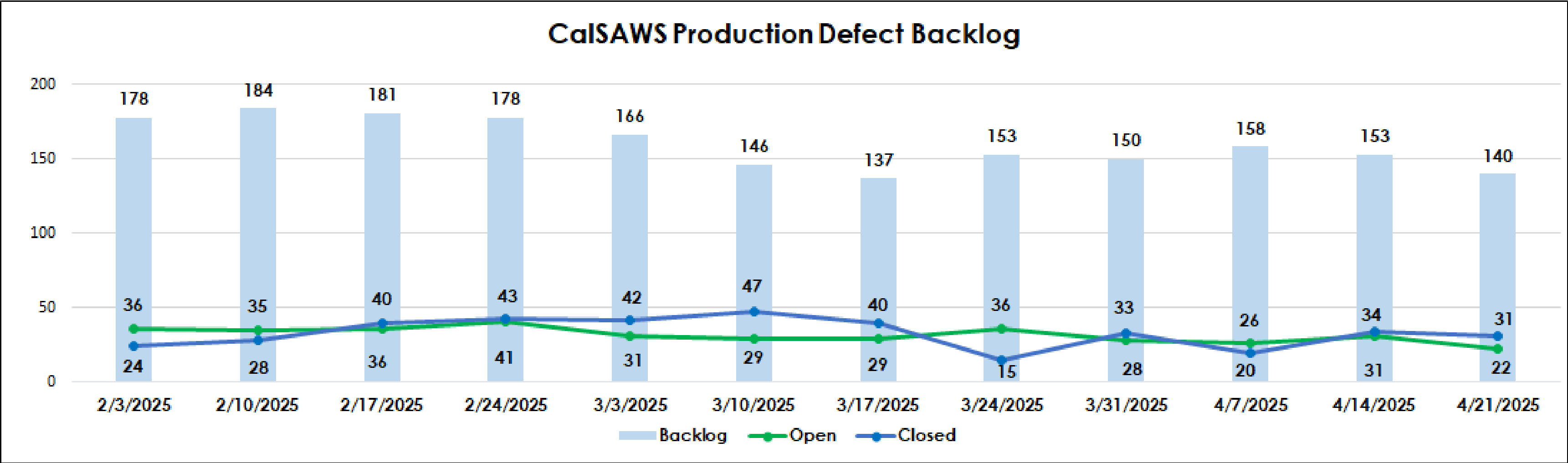
The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

CalSAWS Quarterly Metrics

Production M&E SLA Metrics
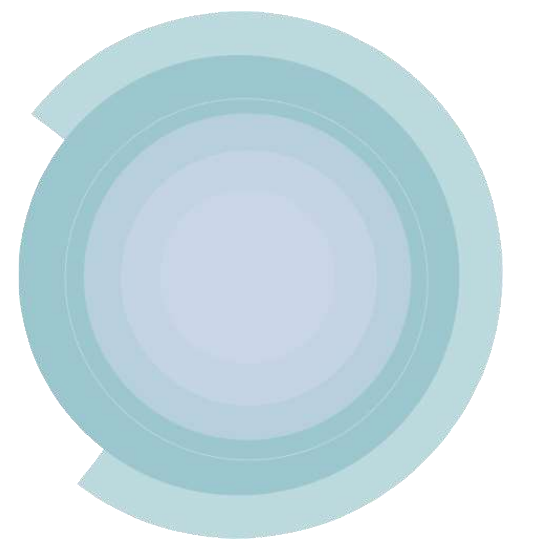
Perf Req #	LD Applies	Performance Requirement Title	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar*	Apr*
1		Monthly Off Prime Business Hours Availability	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
2		Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
3		Monthly Deficiency Notification Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
4		Monthly Helpdesk Diagnosis Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
5	LD	Daily Peak Usage Hours Availability	✘	✔	✔	✔	✘	✔	✔	✔	✔	✔	✔
6	LD	Daily Prime Business Hours Availability	✔	✔	✔	✔	✘	✔	✔	✔	✔	✔	✔
7	LD	Daily Peak Usage Hours ED/BC Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
8	LD	Daily Prime Business Hours ED/BC Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
9	LD	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
10	LD	Daily Prime Business Hours Screen to Screen Navigation Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
11	LD	Daily Batch Production Jobs Completion	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
12		Daily Off Prime Business Hours ED/BC Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
14		Daily Unbounded Search Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
15		Daily Prime Business Hours Availability of CalSAWS Training Environments	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
16		Daily Peak Usage Hours Standard Report Response Time	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
17	LD	Security Incident Notification	✔	✔	✔	✔	✔	✔	✘	✔	✔	✔	✔
18	LD	Security Incident Reporting	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
19	LD	Security Incident Negligence	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
20		Disaster Recovery Response Time	✔	✔	✔	✔	✔	✔	✔	✔	N/A**	N/A**	N/A**

*March and April SLA Metrics are still being formally reviewed
**N/A SLA no longer applies after Infrastructure Transition

Legend: ✔ SLA Met   ✘ SLA Not Met   ☑ LD Applies

Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff.

CalSAWS Quarterly Metrics
Infrastructure
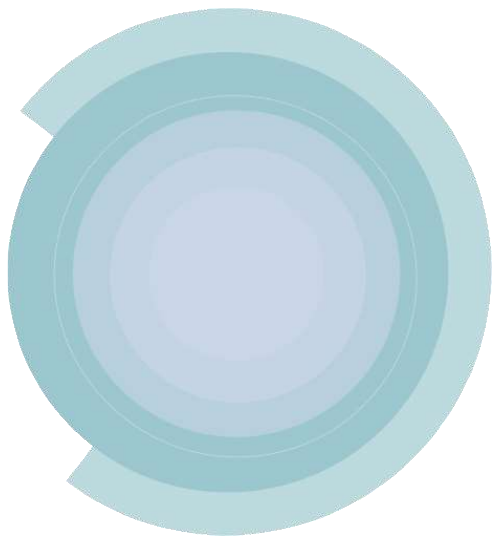
Perf Req #	Performance Requirement Title	Feb	Mar	Apr
1	Daily Prime Business Hours Availability	✓	✓	✓
2	Monthly Prime Business Hours Availability, Non-Production Environments	✓	✓	✓
3	Monthly Off Prime Business Hours Availability	✓	✓	✓
4	Local Repair Services	✓	✓	✓
5	Daily Prime Business Hours Availability of CalSAWS Training Environments	✓	✓	✓
6	Monthly Deficiency Notification Response Time	✓	✓	✓
7	Monthly Service Desk Diagnosis Time Tiers 1 and 2	✓	✓	✓
8	Daily Prime Business Hours Standard Report Response Time	✓	✓	✓
9	Disaster Recovery Response Time	✓	✓	✓
10	Failure to Complete Access Control Audits	✓	✓	✓
11	Security Information and Event Management System Uptime	✓	✓	✓
12	Scheduled Asset Inventory Audits	✓	✓	✓
13	Completion of Root Cause Analysis	✓	✓	✓
14	Privileged Access Audit	✓	✓	✓
15	Security Vulnerability Scans	✓	✓	✓
16	Security Incident Notification	✓	✓	✓
17	Security Incident Reporting	✓	✓	✓
18	Security Incident Negligence	✓	✓	✓

* SLA Metrics are still being formally reviewed

Legend: ✓ SLA Met   ✗ SLA Not Met

Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff after the formal review.

Hyland Quarterly Metrics
Hyland Imaging Performance Metrics
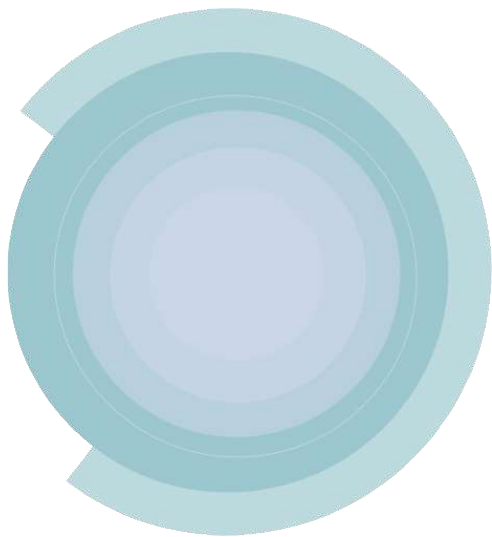
Hyland Imaging SLAs Feb – April 2025	Monthly SLA Target	February 2025	March 2025	April 2025	3-Month Average	SLA Met
Uptime	99.90%	100%	100%	100%	100%	✅
Page Views	90%	99.25%	99.46%	99.26%	99.32%	✅
Database Transactions	90%	99.96%	99.99%	99.97%	99.98%	✅
Brainware Processing	97%	99.87%	99.86%	99.90%	99.87%	✅
Technical Resource Response Time	30 minutes	N/A	N/A	100%	100%	✅

BenefitsCal Performance Metrics
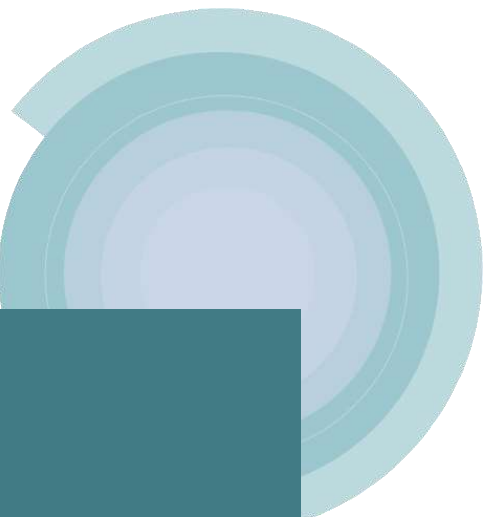
SLA #1:	Daily Online Transactions – inquiry screens (bounded)
Target:	98% with an average response time < 2 seconds
Actual:	**Exceeded daily online transaction (bounded) response time at no less than 99.92%** since January 2023. Measured daily and reported on Monthly.

SLAs and Performance

Monthly View: Jan 2023 – April 2025

Daily View: April 2025

APR 2025

Legend: Target Met — Target Not Met — Weekend

BenefitsCal Performance Metrics (continued)
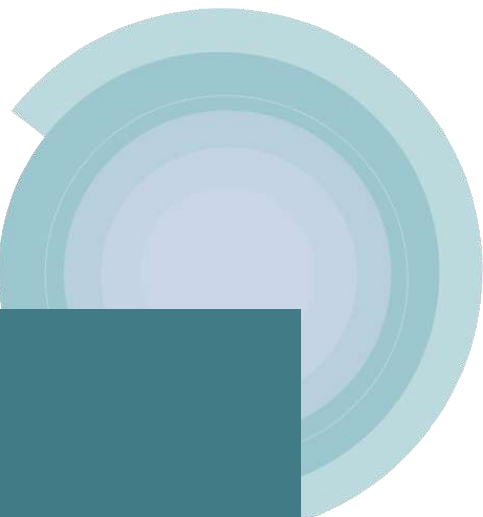
SLA #2: Daily Online Transactions – inquiry screens (unbounded)
Target: 98% with an average response time <10 seconds
Actual: **Exceeded daily online transaction (unbounded) response time at no less than 98.62%** since January 2023.
Measured daily and reported on Monthly

Monthly View: Jan 2023 – April 2025

Daily View: April 2025

SLAs and Performance

BenefitsCal Performance Metrics (continued)
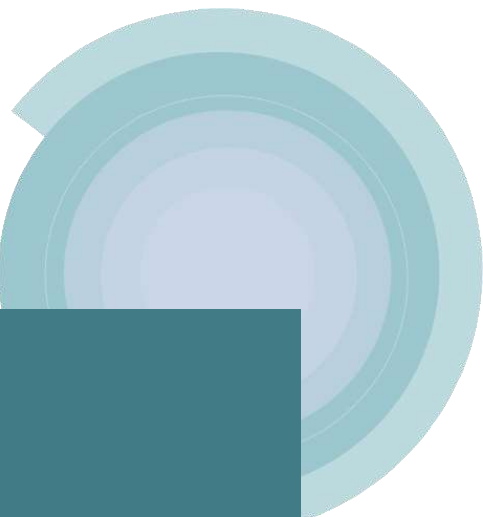
SLA #2:	Daily BenefitsCal Hosted API Transactions
Target:	98% with an average response time <2 seconds
Actual:	**Exceeded daily API transaction response time at no less than 99.97%** since January 2023.
	Measured daily and reported on Monthly

Monthly View: Jan 2023 – April 2025

Daily View: April 2025

CER to BCR Update

CER to Business Case Request (BCR)

Update
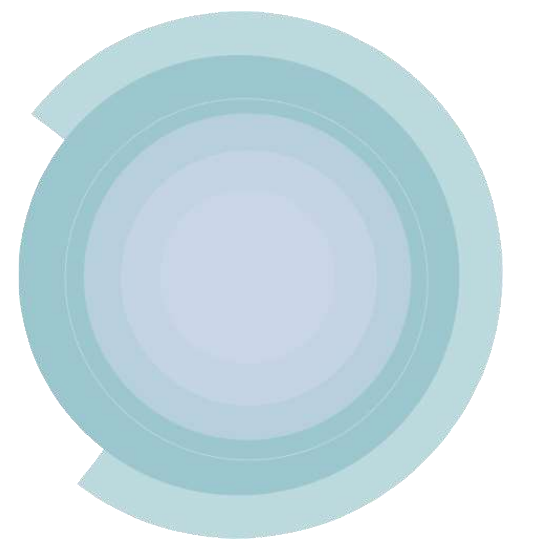
Since last JPA meeting

- PPOC session held 4/29/2025 on proposed changes to move from CERs to BCRs
- Q&A document from PPOC Session in progress
- CER Handbook- new BCR process revisions in progress
- CE Team BCR Leads: Henry Arcangel (CEM) &Yolanda Banuelos (RM)

Next step efforts

- BCR Training and Overview
- CIT- BCR Form & Instructions
- Timeline
- Communications

BenefitsCal Update

BenefitsCal
Release of Information
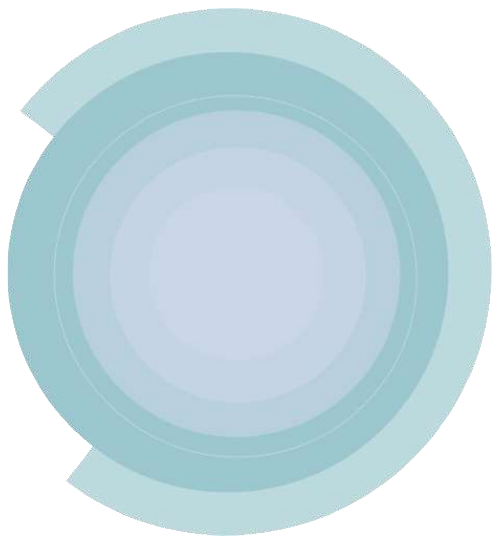
ROI Workgroup Update

ALL COUNTY LETTERS (ACL)

CDSS and DHCS published the final letters.
ACL 24-91 and ACWDL 24-21

CBO INFORMATION & UX

Discussions focusing on the CBO information currently available and what may be needed in the future to support customer, county and CBO needs. Will be followed by user experience explorations.

WORK GROUP MEETINGS

Latest meeting held 4/7
May Session: TBD.

Get CalFresh Transition: Sunset & Support

Ensuring Seamless Service Closure and Providing Ongoing Assistance for Beneficiaries and Stakeholders

2023	2024	2025-Q1	2025-Q2	2025-Q3	2025-Q4
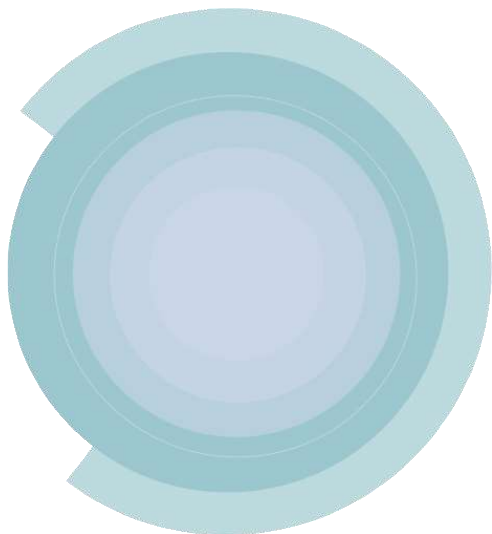
GCF Sunset Outreach
(CDSS letter issued on April 15, 2025)

- CDSS and CodeForAmerica will coordinate with customers and partners using various communication channels
- Recommendations for CWDs and CBOs to update resources and website re-directs to BenefitsCal.com

September 30, 2025
Sunset (End) Date

January 2023 – April 2025

BenefitsCal Enhancements to Support GCF Sunset is *Complete*.

Benefits collaborated with CDSS to complete **34** enhancements
Zero (0) items remain in parity as of **April 2025**

**WE ARE HERE
(April 2025)**

BenefitsCal Activities will support CDSS Outreach efforts

Starting Second quarter of 2025, BenefitsCal will continue to support sunset activities through the end of the year

- ✓ Review resources and assist with communication messaging strategy
- ✓ Support County Readiness, working with RMs to develop checklist for resource updates
- ✓ Support CBO Readiness, working with advocate co-leads to develop checklist for resource updates

BenefitsCal Usage Metrics
Customer Experience Measurement

Starting 2024, the BenefitsCal team has published an Initial set of Portal Usage Metrics on the Public Site (calsaws.org) that includes:
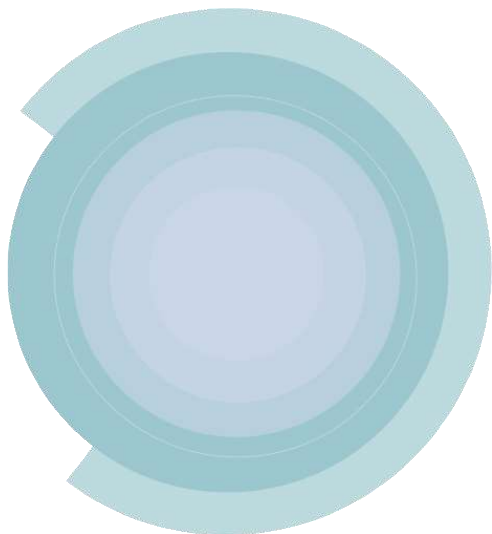
1. Application Data Metrics

2. Applications Started & Not Submitted Metrics – CBOs vs. Customers

3. Customer Feedback – Always on Survey

4. BenefitsCal Technical Help Desk Trends

We heard your request for more metrics! Starting July 2025, the Usage Metrics report will be expanded to include the following additional metrics:

1. Application Page Exit Rates

2. Renewals, Recertification, Redetermination Trends

3. Application Completion Times & Application Outcomes

All metrics will be reported out quarterly in the Usage Metrics Report.

Usage Metrics Published

These baseline metrics are published on CalSAWS.org. The team will continue to track these metrics over time to understand trends and implications.

Application Data Metrics

*Trends aim at BenefitsCal stickiness and effectiveness of adoption efforts over time.*

APPLICATIONS SUBMITTED BY SOURCE BY MONTH

Thousands (scale: 300, 250, 200, 150, 100, 50, -)

	September	October	November	December
■ Customer	111,938	111,726	96,030	96,208
■ CBO	23,188	25,782	21,010	21,397
■ GCF	103,017	93,815	79,763	72,757
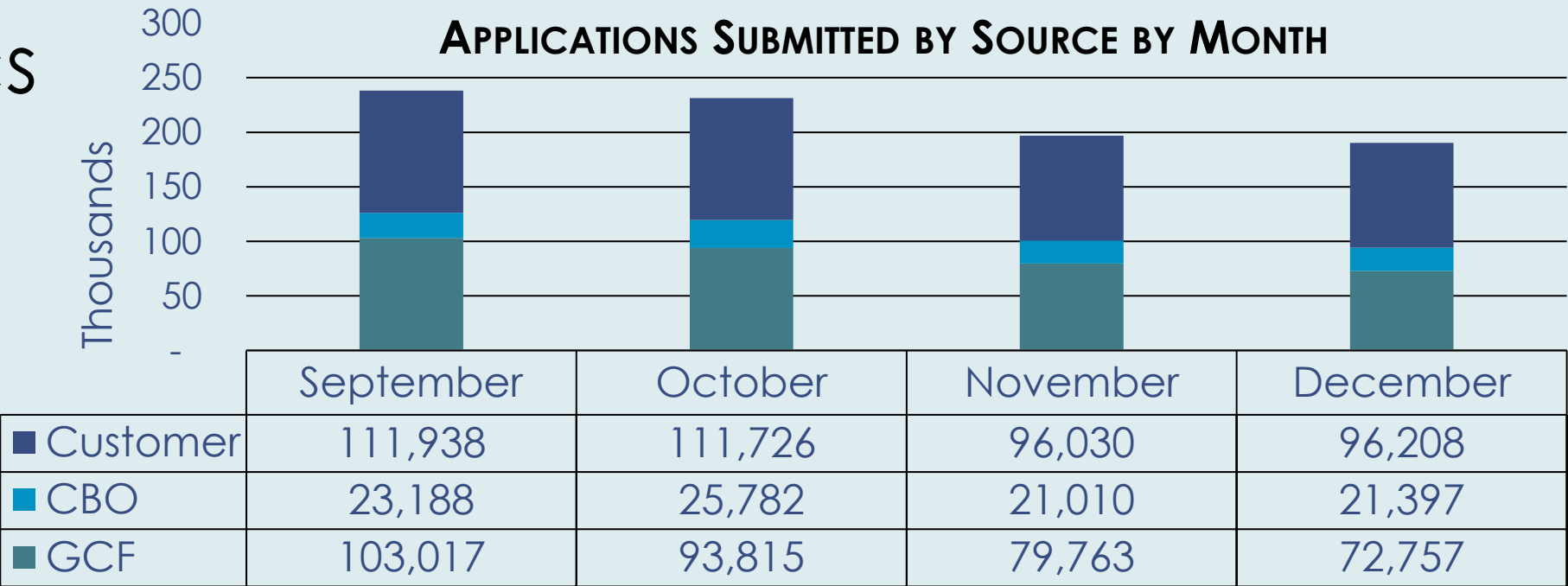
Applications Started & Not Submitted Metrics: CBOs vs. Customers

Trends showcase helpfulness of CBOs and BenefitsCal stickiness over time.

TYPE OF APPLICATION	SUBMISSION RATE
CalFresh Only	69.0%
CalWORKs Only	57.9%
Medi-Cal Only	68.7%
More than one program	55.0%

PROPORTION OF APPS SUBMITTED NOV/DEC

- 38.4%
- 61.6%

■ Submitted   ☐ Not Submitted
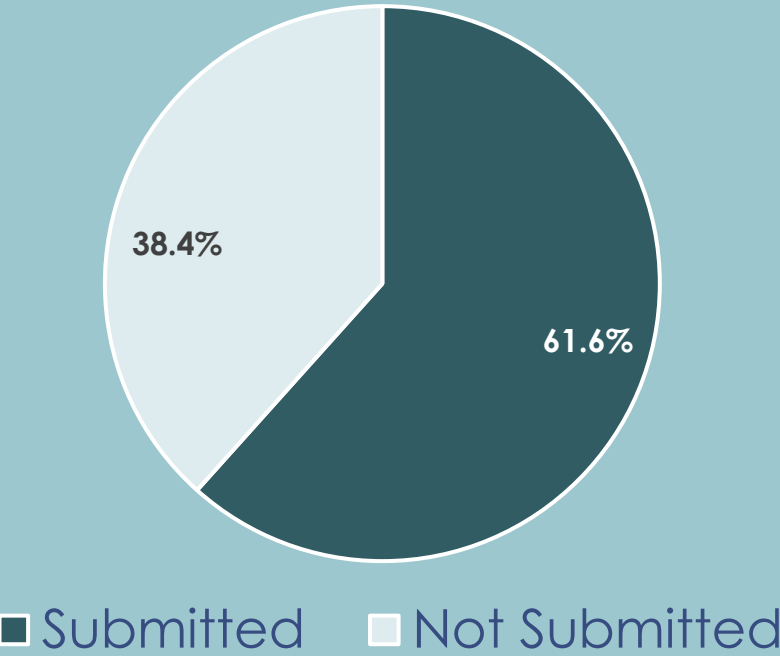
Customer Feedback: Always On Survey

Trends indicate customer satisfaction and opportunities for improvement.

Data Range: 11/01/24 to 12/31/24

| Positive Experience	Constructive Experience
General – Generic positive sentiments about liking BenefitsCal	**Login MFA –** • MFA codes not accepted • Unable to submit codes
User-Friendly – Customers found the website user-friendly • Easy to follow format • Easy to navigate • Simple and understandable interface	**Document Upload –** • Unclear which documents customers needed to upload • Unable to find where to upload documents • Customer receiving upload confirmation even when upload failed
Online Accessibility – Customers appreciate the accessibility of online services • Ability to complete applications online • Ability to receive messages online	**Appointment** – Customer wanted to reschedule appointments

Help Desk Ticket Resolution Timelines

Trends provide insight into employee workload, customers' ability to self-serve, and customer experience. Specific times will be tracked going forward.

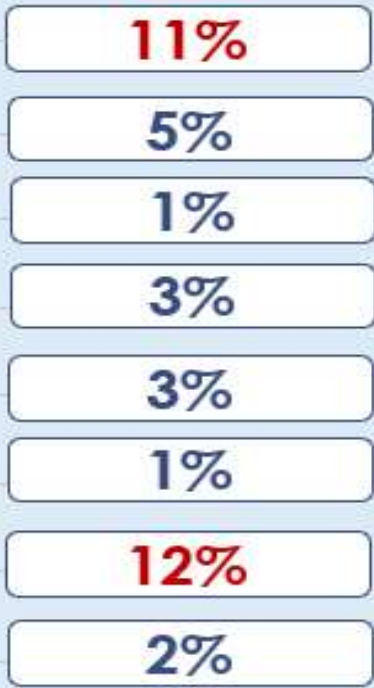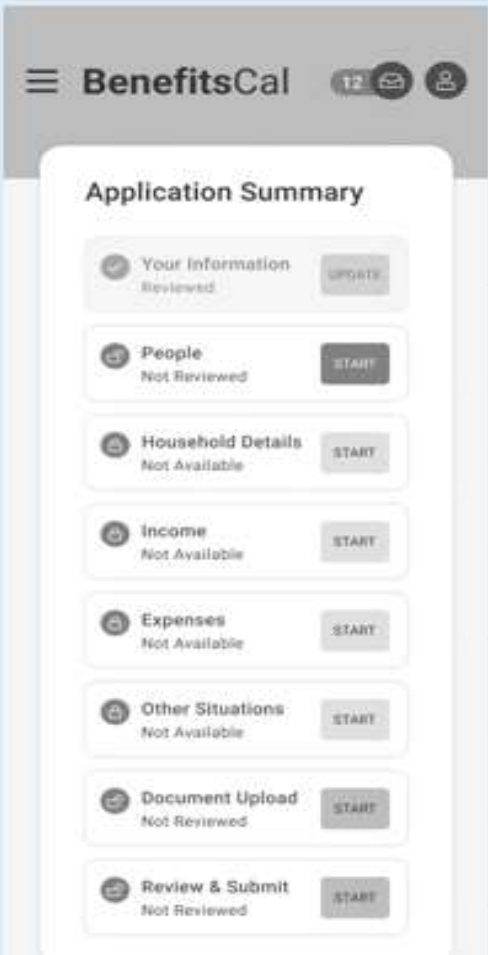| CATEGORY	AVERAGE % (Total tickets between Nov-Dec 2024)
Login/Access	61%
Case Link	15%
Document Upload	10%
Apply	4%
View Case	1%
Renewals	3%
Dashboard	2%
Other (technical and miscellaneous)	4%

Upcoming Usage Metrics

The additional metrics will be published on CalSAWS.org. The team will continue to track these metrics over time to understand trends and implications.
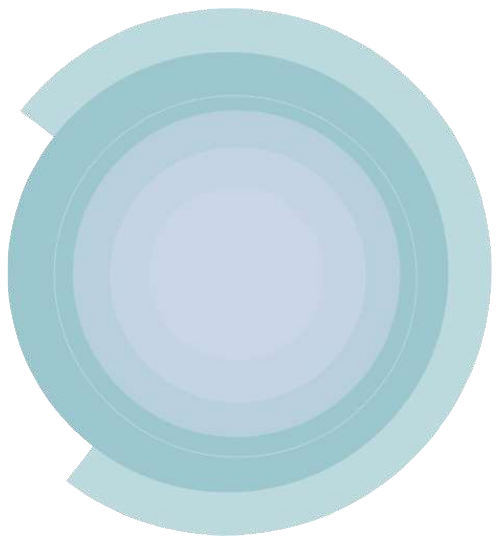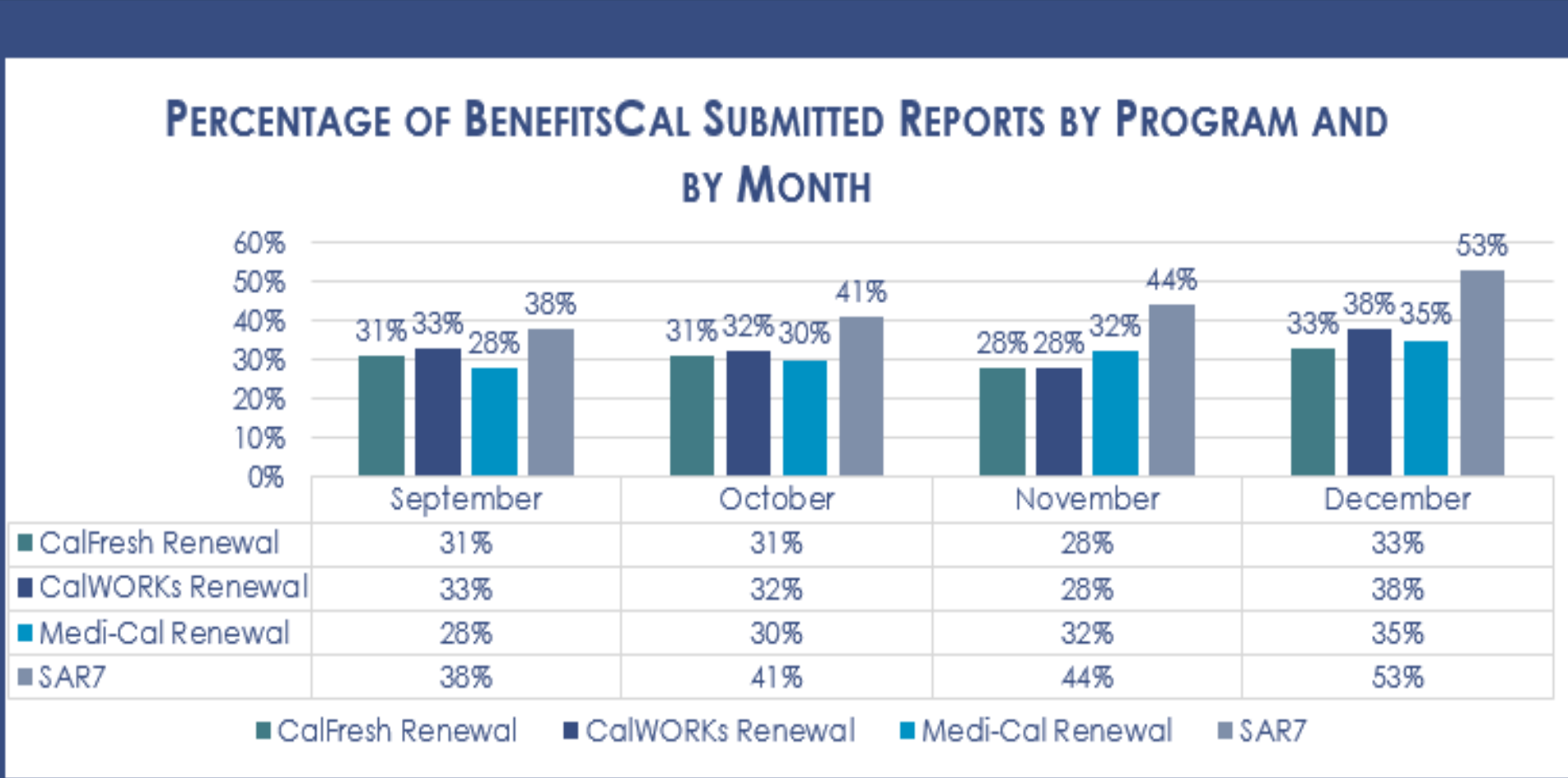
Application Page Exit Rates

- From Jan-Dec 2024, **1.24M** users started new BenefitsCal Apps
- **62%** of these apps were **completed**
- **38%** of new BenefitsCal users resulted in **drop-offs**

Application Summary

Your Information Reviewed	11%
People Not Reviewed	5%
Household Details Not Available	1%
Income Not Available	3%
Expenses Not Reviewed	3%
Other Situations Not Reviewed	1%
Document Upload Not Reviewed	12%
Review & Submit Not Reviewed	2%

Most Page Exits occur in the **Your Information** section and **Document Upload** section

Renewals, Recertification, & Redetermination Trends

Current Report in Initial Usage Metrics

PERCENTAGE OF BENEFITSCAL SUBMITTED REPORTS BY PROGRAM AND BY MONTH

	September	October	November	December
CalFresh Renewal	31%	31%	28%	33%
CalWORKs Renewal	33%	32%	28%	38%
Medi-Cal Renewal	28%	30%	32%	35%
SAR7	38%	41%	44%	53%

Application Completion Times & Outcomes

Success Measures:

Industry Standards

- What are Covered California's metrics vs. Medi-Cal only?
- What are GetCalFresh's metrics vs. CalFresh only?

Population Demographics

- Length of time to apply for demographics?
- Device Type Impact

Programs

Programs or combinations of programs show most significant length of time to apply?

Data shared at the Quarterly Stakeholder Meeting

Length of Time to Apply – BenefitsCal Customers

0-15	16-30	31-45	46-60	61-75	75+
10%	32%	21%	11%	6%	20%

Time Taken to Finish Application (mins)

Length of Time to Apply – BenefitsCal CBOs

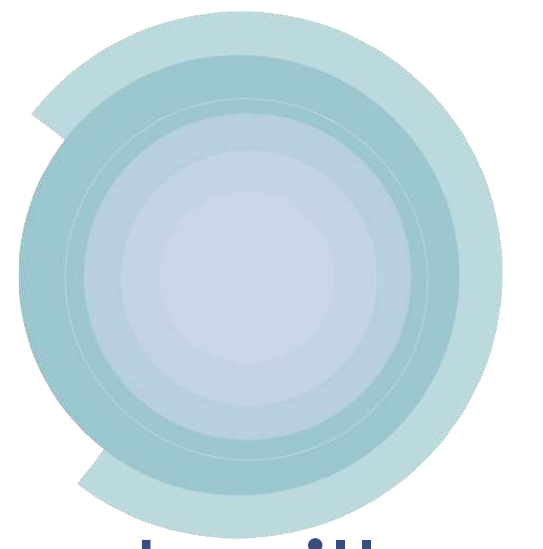| 0-15	16-30	31-45	46-60	61-75	75+
21%	33%	18%	8%	4%	16%

Time Taken to Finish Application (mins)
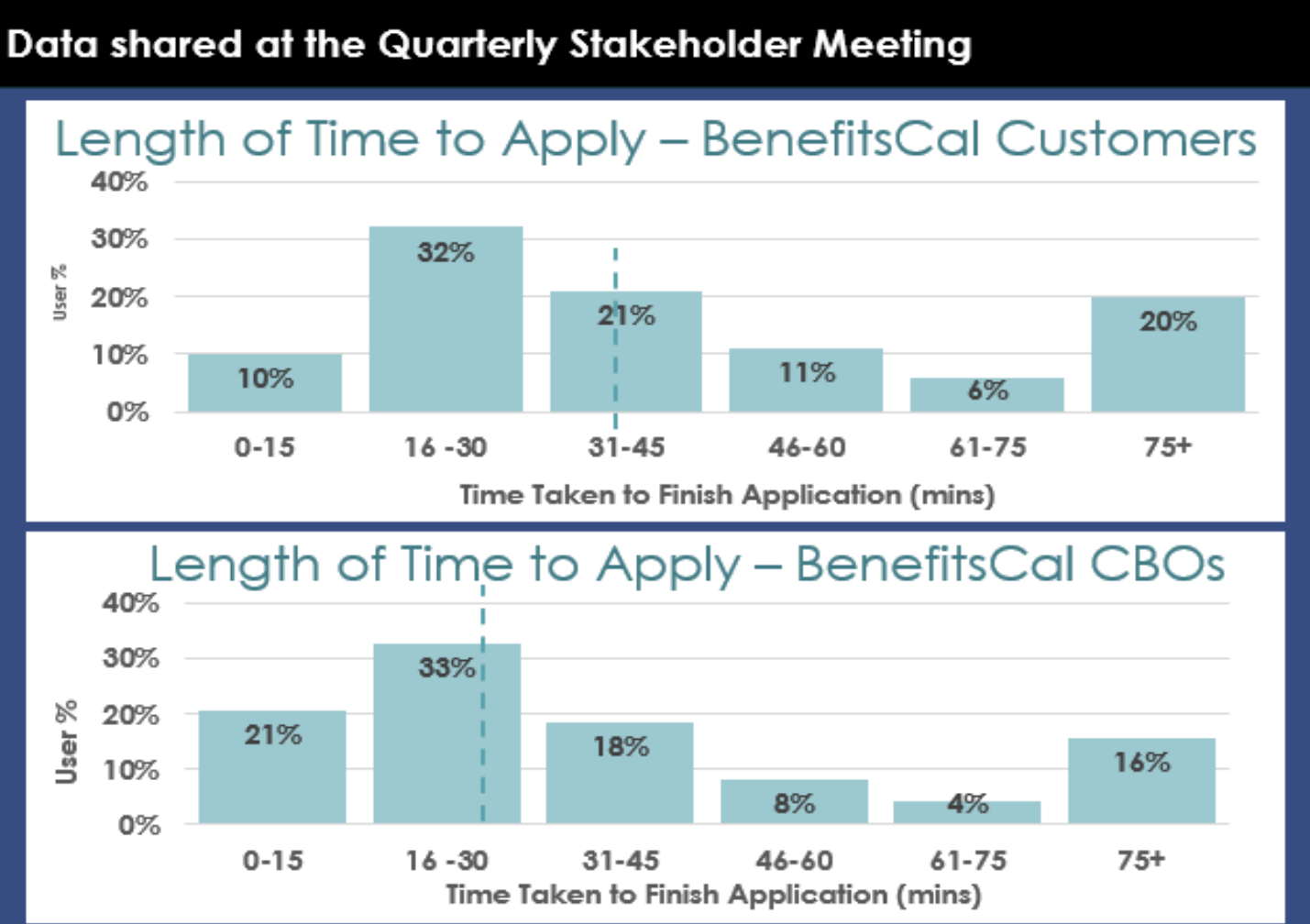
Strategies for Enhancing this Report

- Include the # of users who create an account and link a case but aren't using BenefitsCal
- Track the # of users entering BenefitsCal but dropping off

Policy & Release Update

# Statewide Cash Aid Time Limit (SCATL)Implementation

Key Dates

- WDTIP TRAC will go into read only mode starting May 23rd, 2025, and will remain available until June 30th, 2026, for review (read only)

- CalSAWS Cash Aid Time limit pages will be set to read only mode starting May 23rd, 2025, and will be retained for review for 18 months

- Data Conversion and Migration will occur over the long weekend May 24th - 25th, 2025

- Statewide Cash Aid Time Limit (SCATL) application will be available starting May 26th, 2025

Statewide Cash Aid Time Limit (SCATL)Implementation

Organization Change Management Materials
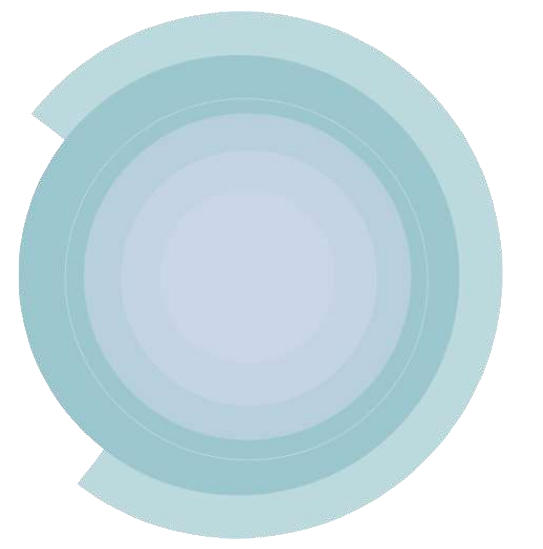
Training and Online Help Updates

- ❖ Time Limit job aids and Online Help
- ❖ Web-Based Training (WBT) – WBTs will be available in the LMS starting 05/16/2025

Reference Materials

- ❖ Page-to-Page Mapping Reference
- ❖ Definitions of Related Terms
- ❖ Question and Answer Document

Pre-recorded Demos

- ❖ Short (2–3 minute) topic-specific demos
- ❖ Covers functionality demonstrated during live sessions

County Readiness Checklist

The reference materials, recorded demos and readiness checklist can be found: CalSAWS Web Portal/Resources/Resources by Functional Area/WDTIP Time Limits/SCATL Reference Materials

Release and Policy Update

Upcoming Releases

May Baseline (5/19/2025) and Priority Releases	June Baseline (6/16/2025) and Priority Releases	July Baseline (7/21/2025) and Priority Releases	August Priority Releases
5/19/2025: • ACL 24-01 - CF Restaurant Meals Program Eligibility Program Updates and CF 889 • ACL 23-79 Add IRT and Budget to CF 377.1, CF 377.1 A, and CF 377.4 SAR • MEDIL I 21-31 - Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries Phase II **5/25/2025:** • Migrate WDTIP Data and Online Screens to CalSAWS	**6/6/2025:** • One time Batch EDBC run for all the non TCVAP CW CF cases with R1/R2 aid code **6/16/2025:** • CalHEERS eHIT: Inclusion of Reasonable Explanation to CalHEERS	**7/XX/2025:** • ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 COLA Values • ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 - Batch EDBC COLA **7/21/2025:** • ACL 22-85 - CalFresh CF 296 and Expedited Service Redesign • ACL 10-01, ACL 15-94, ACL 15-94E - CF 387 CalFresh Request for Information for Residency	**8/XX/2025:** • ACL 21-45 - Add new CW and WTW Notices • 2025-2026 CalFresh COLA; ACL 25-XX Update CalWORKs (CW) MAP for 2025-2026; Update CalWORKs (CW) IRT Levels for 2025-2026

Release and Policy Update

Upcoming Releases – 25.05

TESTING

System Test, QA, and county validation are all in progress

RELEASE COMMUNICATION

Major Upcoming Changes (MUC): Draft 3/28/2025 Final 4/24/2025

Webcast: 4/29/2025

Newsletter and Release Notes: Week of 5/12/2025

DEPLOYMENT

Greenlight: 5/14/2025

Deployment: 5/18/2025

POST RELEASE

Post-Release Daily calls are scheduled for: 5/19/2025 - 5/21/2025
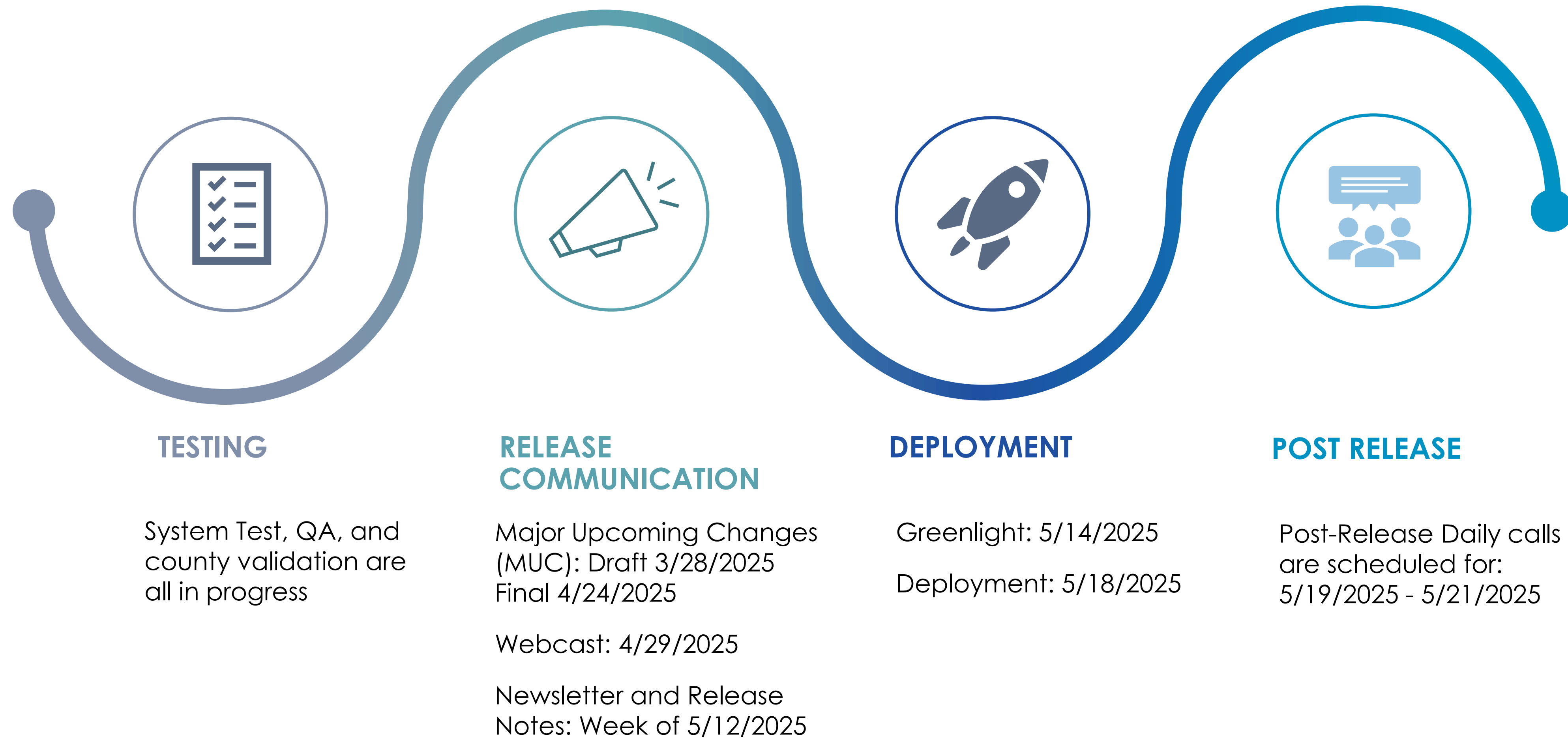
Transition Update

Infrastructure Transition

Future Transitions – Transition In Place

Imaging

Contact Center

Access Mgmt

- Transition of ticket triage and response completed April 1, 2025
- Transition of custom application components planned for June 1, 2025
- SaaS and hosting services continue to be provided by Hyland

- Infrastructure transitioned February 1, 2025
- Transition of application and remaining services planned for July 11, 2025
- Transition of Call Summarization (Gen AI) on July 31, 2025

- Ping Identity formerly known as ForgeRock
- Infrastructure transitioned February 1, 2025
- Transition of custom application components planned for June 2, 2025

M&E Transition-In Progress

3-Month M&E Major Project Accomplishments

| Accomplishment	Details	Impact
Established M&E Transition Dashboard	• Launched a **comprehensive dashboard** that provides transparent tracking of tasks and activities, achieving over 73% completion of Transition Knowledge Transfer sessions. • Additionally, all **transition deliverables** (transition-in master plan, work schedule, and test & validation plan) have been approved.	• Allows for **streamlined project management and accountability**, facilitating smoother transitions and enhancing project execution efficiency • The approval of key deliverables further **solidifies our strategic planning and operational readiness**, **positioning the team for continued success.**
Setting up the Sandbox Environment	• Successfully **established the Sandbox environment**, enabling the team to access the application for code review and 25.05/07 practice	• This setup is **crucial for fostering a robust development and testing process**, allowing for early identification and resolution of issues, improving code quality, and accelerating project timelines. • The Sandbox environment also **empowers the team to experiment and innovate** without impacting live systems, thereby enhancing overall project reliability and performance.
Completed OCAT Cutover	• Seamlessly **assumed control of the OCAT system**, allowing for robust monitoring for incidents and maintaining operational integrity. • Additionally, **completed two rounds of testing** and continue to **perform ongoing monthly testing** for defect resolution.	• These efforts resulted in a **seamless transition** on the security and incident management front, thus reducing risks and ensuring system reliability.
Completed SIRFA/SCERFA – Part 1 Cutover	• Effectively **took over responsibilities for SIRFA/SCERFA**, delivering in-depth policy analysis that supports informed decision-making and strategic planning.	• This takeover provides critical insights that enhance our policy framework, **driving more effective strategies and operational efficiency**.
Initiated CalSAWS Releases	• Successfully kicked off the **Job Shadow/Reverse Job Shadow for the CalSAWS Release 25.09**, **started planning for the CalSAWS Release 25.11** and the **joint application design sessions for CalSAWS-CalHEERS Release 26.02**.	• This provides an early start on design and development activities, helping to facilitate **quality delivery of our initial releases**.
Initiated Development of System Security Plan (SSP)	• Began **mapping to revision 5 controls**, including the completion of Assessment, Authorization, and Monitoring controls, and initiated development of 'Response Group A' controls in the Planning family.	• This foundational work is **crucial for allowing for compliance and strengthening our security framework**, safeguarding our systems against potential threats.

M&E Transition-In Progress
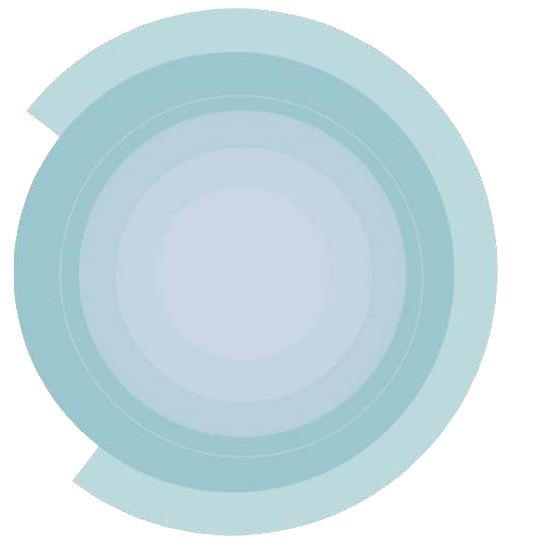
Looking Forward:

- Continue detailed planning for Release 25.11

- Conduct CalHEERS JAD sessions for Release 26.02 (to begin in May)

- Align on path forward to build out an Analytics Platform – beginning process of approvals, detailed planning, and collecting feedback from Counties
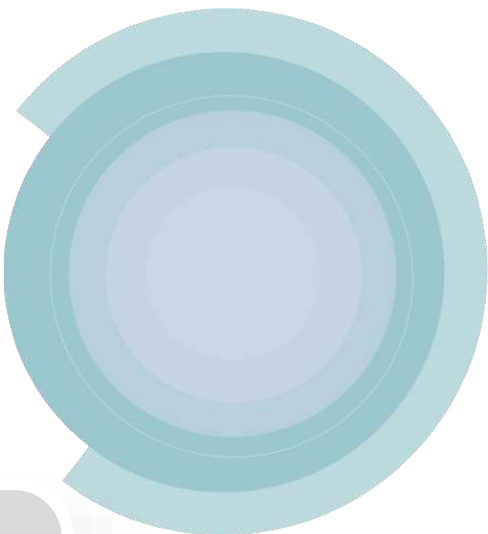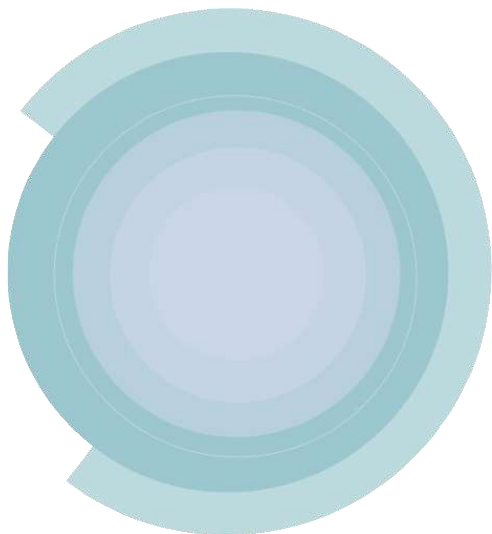
M&E Transition-In Timeline
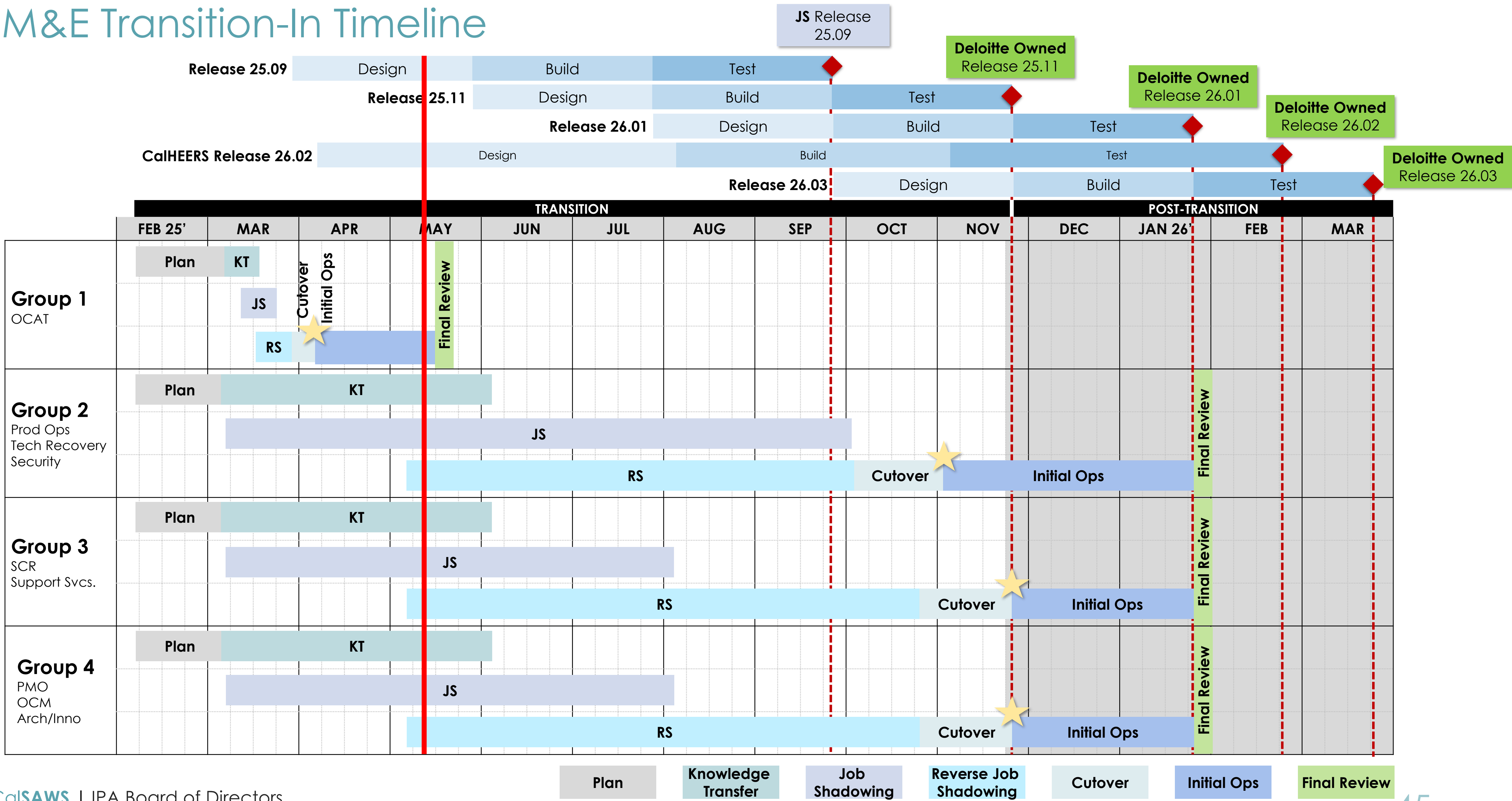
M&E Transition-In Progress

As of 5/2/2025

Summary of Logged M&E Risks

| Risk ID	Risk Level	Description	Mitigation Plan	Latest Updates
ID: 313 Status: 2 – Open	Medium	Failure to provide M&E team timely access to environments and tools may impact transition	• Daily meetings between vendor partners to address outstanding access issues • Utilize exception process where needed	4/28/2025: Access for AWS Accounts and Database completed. Access for Amazon Q for Developer Workspaces in progress.
ID: 314 Status: 2 - Open	Medium	Limited Availability of Accenture Staff May Impact the M&E Transition Schedule	• For KT: Record KT sessions, collapse duplicate KT sessions, do cascade KT. • For RS: Stagger RS one month after JS for each function/services.	4/30/2025: Accenture continues to provide KT/JS as planned. Commenced providing JS for Release 25.09. 4/15/2025: Accenture and Deloitte have finalized the list of SCRs and the approach to JS and RJS for and KT Release 25.09.

CalSAWS Procurement Update

Procurement Timeline
Key Procurement Tasks

	QA Procurement Event	Dates
1	RFP Development	December 11, 2024 – April 14, 2025
2	Consortium Review and Approvals	April 15 – 23, 2025
3	State Review and Approvals	April 29 – May 30, 2025
4	Federal Review and Approvals	June 4 – August 5, 2025
5	Release RFP	August 11, 2025
6	Conduct Bidder's Conference	August 19, 2025
7	Bidder Question and Answer Period	August 11 – September 2, 2025
8	Consortium Publishes Final Q&A and RFP Addendum	September 16, 2025
9	Proposals Due	October 20, 2025
10	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	October 21, 2025 – May 27, 2026
11	Prepare and Approve Vendor Selection Report	May 28 – July 1, 2026
12	Publish Notice of Intent to Award and VSR	July 2, 2026
13	Contract Negotiations	July 7 – 15, 2026
15	State Contract Approval	July 20 – August 19, 2026
16	Federal Contract Approval	August 20 – October 20, 2026
17	Contingency Period	October 21 – November 13, 2026
18	JPA BOD Approval	November 20, 2026
19	Contract Start	December 1, 2026
20	Transition-In Period (2 Months)	December 1, 2026 – January 29, 2027

CalSAWS Conference Update

2025 CalSAWS Conference

June 26-27, 2025 | San Diego, CA
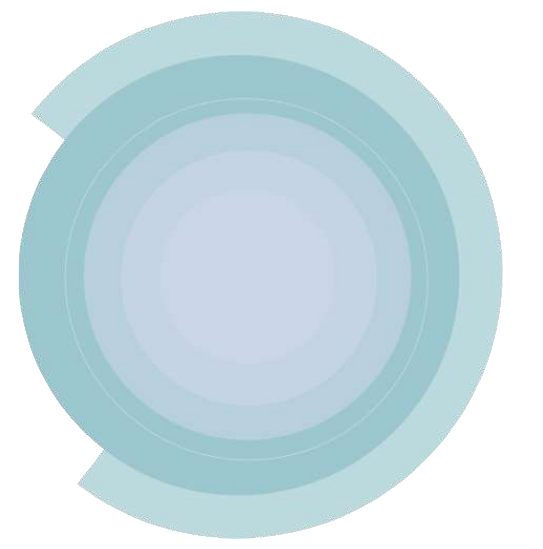
- Registration Closes May 23, 2025
  - 274 Attendees as of 5/5/25
  - Quorum of Directors is on track, but it is close.
  - Quorum of PSC is on track.
- Hotel room block is full, but rooms are still available at full price
- Links to register:
  - Click here for Eventbrite Registration
  - Click Here for Westin San Diego Gaslamp Quarter Reservations

Adjourn Meeting