

# *California Statewide Automated Welfare System (CalSAWS)*

CalSAWS Consortium  
San Mateo County Purchase SM-01-2025

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# **County Purchase SM-01-2025**

## **San Mateo County - Additional Reporting Support**

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**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 (“Base Agreement”) between CalSAWS Consortium and Accenture LLP (“Accenture”), San Mateo County (“County”) has requested enhanced development support to assist the County in analyzing the County’s existing ad hoc reports and developing queries to pull data from the CalSAWS Application, as further described in this County order form (“County Purchase”).

**II. Scope:**

The County identified a business need for Accenture to provide Regulatory and Administrative (“R&A”) Change Budget Services to assist in the County’s analysis and refactoring of County ad hoc reports.

This County Purchase describes the one-time R&A Change Budget Services for Accenture to provide technical consulting support to assist the County with data visualization and automated email distribution of the County’s ad hoc reports. These charges include up to 370 hours of support to assist with the following:

- Accenture will conduct meetings with the County to become familiar with the County's existing ad hoc reports and business needs to assist with the visualization of its ad hoc reports.
  - The scope will be limited to ad hoc reports in the following business areas:
    - Intake Worker Productivity
      - Yesterday
      - Week-to-Date
      - Month-to-Date
    - Daily Intake Statistics
      - Daily Intake
      - Inter-County Transfer (“ICT”)
    - Continuing Worker Productivity
      - Yesterday
      - Week-to-Date
      - Month-to-Date
    - Continuing Eligibility Statistics
      - Semi-Annual Report 7 (“SAR7”) Completion Rate
      - Overdue SAR7 Previous Month
      - California Work Opportunities and Responsibility to Kids (“CalWORKs”) Redetermination Completion Rate
      - CalWORKs Redetermination Previous Months
      - CalFresh Redetermination Completion Rate
      - CalFresh Redetermination Previous Months
      - Medi-Cal Redetermination Completion Rate
      - Medi-Cal Redetermination Previous Months
      - General Assistance Quarterly Report 7 (“QR7”) Completion Rate

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- Overdue General Assistance QR7 Previous Months
- General Assistance Redetermination Completion Rate
- CalWORKs County by Redetermination Month
- General Assistance County by Redetermination Month
- CalWORKs Caseload
- Future Medi-Cal Redetermination
- Future CalFresh Redetermination
- Modified Adjusted Gross Income (“MAGI”)
- Critical Tasks
- Postponed Verification
- Homeless Assistance
- ICT
- Welfare-to-Work (“WTW”) Statistics
  - WtW Alerts
  - Work Participation Rate (“WPR”) Alerts
  - Child Care Alerts
  - Caseload Summary
  - Caseload Detail
- Based on the outcome of the meetings, Accenture resources with knowledge of the CalSAWS Application will develop new visual reports and dashboards based on the County's ad hoc reports using Microsoft Power BI. Accenture staff will work with County resource(s) to complete a user acceptance test and validate the accuracy of the data in the new Power BI reports.
- Accenture will work with the County to automatically distribute the new reports in an Excel format to County staff leveraging the reports subscription functionality of Power BI. The number of configurable rules and report subscriptions to be developed will be determined and agreed to by Accenture and the County as an outcome of a requirements gathering analysis and based on the remaining hours available as part of this County Purchase.

This County Purchase also includes up to thirty-eight (38) 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.

The scope of this County Purchase includes the following:

- One-Time R&A Change Budget Services

### III. Assumptions

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

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- 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 408 hours, estimated to commence upon approval of this County Purchase and continue through the end of State Fiscal Year (“SFY”) 2024/25, May 31, 2025. 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 408 hours will be worked and invoiced in SFY 2024/25, estimated to commence upon approval of this County Purchase and continue through the end of SFY 2024/25, May 31, 2025. If the County requests for additional hours to be performed during SFY 2024/25 or 2025/26 prior to the expiration of the Base Agreement (currently July 31, 2025), then a revision to this County Purchase will be required. If the County requires additional services beyond the expiration of the Base Agreement, a new County Purchase will be required under a new CalSAWS agreement.
  - This estimate excludes hours to support activities that may be required to continue services beyond the expiration of the Base Agreement.
  - If the County causes delays that extend the schedule for the work outlined in this County Purchase beyond the expiration of the Base Agreement (currently July 31, 2025), the work shall be placed on hold until a new County Purchase is executed under a new CalSAWS agreement. Accenture will be entitled to receive payment for full or partial work performed under this County Purchase.
  - Accenture and the 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 will result in additional charges. These additional charges would be provided to the County in a separate County Purchase.
- Accenture staff will work with the County to develop a schedule following approval of this County Purchase.
  - This County Purchase must be approved by April 21, 2025 in order for R&A Change Budget Services of up to 408 hours to be worked and invoiced in SFY 2024/25, through May 31, 2025. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.
- If the number of configurable rules and report subscriptions exceeds the capacity based on the remaining hours available in this County Purchase, the County will provide a prioritized list of rules and report subscriptions.
- Accenture will conduct regular meetings with the County team via Microsoft Teams to manage activities performed under this County Purchase order.
- All work will be performed remotely within the fifty (50) United States and the District of Columbia.
- The County will be responsible for providing Accenture staff with access to County-specific tools or software that is outside of CalSAWS, including provisional access to County collaboration sites, software tools, software licensing, network connectivity, and access to data, tools, and systems, etc., including the County’s virtual private network (“VPN”).
- The County will be responsible for approving access to the CalSAWS Project Web Portal.

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- Testing of queries will leverage existing CalSAWS test environments and masked data. The County is responsible for maintaining the security of Production data and will not load unmasked Production data into the test environments.
- The County will be responsible for validating the Power BI dashboards and reports (Excel extracts) and providing documented approval within one (1) week of receiving notification of delivery. If the County does not provide documented comments or approval within one (1) week of delivery of the dashboards and reports, the County is implicitly approving the dashboard(s) provided by Accenture.
- The County will be responsible for obtaining access to County datasets from the Consortium.
- The County will identify and provide the appropriate County staff to support project activities throughout the term of this County Purchase.
- Accenture will be responsible for developing the queries in SQL format and providing functional documentation.
- The County will be responsible for integrating the queries into the County's data visualization tools and ongoing distribution of the reports.
- The queries being developed will not be replications of existing reports. The queries will be developed based on the unique needs of the County identified during the business needs assessment outlined above.
- Data displayed on the query results will be limited to data available within CalSAWS. The queries will not aggregate data from different sources.
- The County does not require Accenture to assess or utilize code or query logic from existing reports.
- This County Purchase does not include a warranty or ongoing support for the queries developed by Accenture. Any requested updates to the query, including to address performance or other errors, identified after the query has been validated by the County are not within the scope of this County Purchase.
- 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 the enhanced support in this County Purchase.
- 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 April 21, 2025 in order 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.

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**IV. Schedule:**

The charges associated with this County Purchase will be incurred during SFY 2024/25.

**V. Total Charges:**

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

Total County Purchase Charges	SFY 24/25	SFY 25/26	Total Charges
<b>One-Time R&amp;A Change Budget Services</b>	<b>\$64,437.54</b>	<b>\$0.00</b>	<b>\$64,437.54</b>
<b>Recurring R&amp;A Change Budget Services</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Hardware and Software Charges</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
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
<b>Production Operations Charges</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
One Time Charges	\$0.00	\$0.00	\$0.00
Recurring Charges	\$0.00	\$0.00	\$0.00
<b>Total Charges</b>	<b>\$64,437.54</b>	<b>\$0.00</b>	<b>\$64,437.54</b>

**VI. Attachment 1 to the County Purchase SM-01-2025 – Pricing Schedules**

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**COUNTY PURCHASE APPROVAL**

**Subject:** County Purchase – SM-01-2025

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

**San Mateo County**

By:  \_\_\_\_\_  
Signed by: Claire Cunningham  
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Printed Name: Claire Cunningham

Title: Agency Director  
4/8/2025

Date: \_\_\_\_\_

**Approved As to Form:**

San Mateo County Attorney

By:  \_\_\_\_\_  
Signed by: Candice Costa  
3092E05022A9417...

Printed Name: Candice Costa

Title: San Mateo County Attorney

4/8/2025

Date: \_\_\_\_\_

**Notice Address:**

County of San Mateo  
500 County Center, Floor 2  
Redwood City, CA 94063

**CalSAWS Consortium**

By:  \_\_\_\_\_  
Holly Murphy (Apr 21, 2025 19:03 PDT)

Printed Name: Holly Murphy

Title: CAO

Date: 04/21/2025

**Notice Address:**

CalSAWS Consortium  
620 Roseville Parkway  
Roseville, CA 95747

**Accenture LLP**

By:  \_\_\_\_\_  
Lisa Salas (Apr 21, 2025 15:59 PDT)

Printed Name: Lisa Salas

Title: Managing Director

Date: 04/21/2025