



# **Sacramento Calabrio Training**

Sacramento County

**SE-02-2025**

April 17, 2025

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/17/2025	1.0	Created Document	Brian Sikes
03/18/2025	1.1	Completed Internal Review	Brian Sikes
04/08/2025	1.2	Addressed Consortium Comments	Brian Sikes
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4/17/2025	2.0	Sent to County	Brian Sikes

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#### REQUESTED SERVICES

### 1. OVERVIEW

Pursuant to Section 8.7 of the CalSAWS Infrastructure Agreement between the CalSAWS Consortium and Gainwell Technologies LLC ("Gainwell") effective October 01, 2024, Consortium shall also have the right to order and purchase Work that is in connection with the CalSAWS System and which will be used by Consortium Members, by executing and delivering an order form that is agreed to in writing by Contractor and Consortium and executed by the applicable Consortium Member. In the event of a conflict or inconsistency between the terms and conditions of an order and this Agreement, the terms and conditions of this Agreement shall control to the extent of the conflict or inconsistency.

Sacramento County is requesting Calabrio training and additional support for their Analysts and Technical staff who manage their Contact Center. Calabrio is a workforce management tool leveraged by Counties to track worker's adherence to schedule.

### 2. SCOPE OF WORK: REQUIREMENTS AND DESIGN

Sacramento County is purchasing Calabrio Professional Services for Workforce Management (WFM) Training on Workshops & Consulting, specifically:

- a. One (1) two (2)-day WFM Training for Workshops. Each day will have six (6) hours each which will be delivered onsite.
- b. Ten (10) Consulting hours to be used for consulting sessions for Classic Calabrio WFM which will be delivered remotely.

### 3. ASSUMPTIONS

#### 3.1. FINANCIAL ASSUMPTIONS:

- a. The charges in Section 4 below, "Total Estimated Charges," are estimates and are subject to change.
- b. The Total Charges below reflect the scope of work outlined within this County Purchase. Any changes in scope must be mutually agreed upon by the parties involved and may result in additional charges. Any additional charges will be executed as a revision/amendment to this County Purchase.

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- c. Training cost estimates include a Calabrio project manager for planning and coordinating, and Calabrio consultant's travel time, training, preparation, discovery, post training questions, etc.
- d. Travel cost estimates include the Calabrio consultant's flight, taxi, lodging, food, etc. Sacramento County will be charged afterwards on the actual travel cost.
- e. Invoicing will occur at the completion of services, including actual travel cost.
- f. Training/workshops that run outside of the mutually agreed to and approved project timeline due to County delay (i.e., environmental issues, delays in environment access or credentials, etc..) and have a net result of follow-up calls and re-engagement calls may be deemed as billable for the added work.
- g. Workshop/Training Refund and Cancellation Policy
  - County may reschedule or cancel their participation in instructor-led training workshops or classes up to two (2) weeks prior to the session, without a penalty. Cancellations within two (2) weeks of the session are subject to a rescheduling fee of 10% of the booked training/workshop.
  - Cancellations within one (1) week of the session are subject to a rescheduling fee of 50% of the booked training/workshop
  - Cancellations within one (1) business day of the session are subject to a rescheduling fee of 100% of the booked training/workshop.
  - A new County Purchase Order will need to be executed to bill any rescheduling fees incurred before the training/workshop can be rescheduled.
  - In the event that a class or workshop must be cancelled, Calabrio will not provide compensation for any external costs of cancellation, such as County hourly compensation or County travel costs.

### 3.2. GENERAL ASSUMPTIONS:

- a. Calabrio Responsibilities:

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- Overall Project and Project Management
  - Calabrio will designate a project manager who is the primary point of contact for Sacramento County.
  - Calabrio will designate resources to perform services, as required.
- Training
  - Calabrio will conduct one (1) two (2)-day onsite training session, which each day having six (6) hours each. The training will be focused on Classic Calabrio WFM and the agenda will be discussed prior to going onsite for the training.
  - In preparation for the onsite training, Calabrio will work with Sacramento County to develop the appropriate training agenda for the team. The team will have a 1-hour discovery meeting to discuss the type of consulting/training needed, the groups needing training, and how the County would like to have the consulting/training delivered. Based on this meeting, Calabrio consultant may create a custom agenda or prepare other materials for successful two-day session. The one 1-hour discovery meeting will be independent of the time allotted for training and consulting.
  - Calabrio consultant may also review Sacramento County's WFM settings and provide tips, tricks, and best practices for improving County's operations.
- Consulting
  - Calabrio will provide ten (10) Consulting hours of be used for remote consulting sessions for Classic Calabrio WFM. Consulting sessions will be a minimum of one (1) hour and are not to exceed four (4) hours per day. Time will be allocated to meet with Sacramento County prior to remote consulting to create any necessary agenda and to prepare for the consulting event.

#### b. Sacramento County Responsibilities:

- Overall Project and Project Management
  - Sacramento County will provide a single point of contact for communications and county responsibilities such as a project manager.

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- Sacramento County will provide access to Calabrio ONE tenant for Calabrio resources.
- On-site Location
  - Sacramento County will provide the venue and facilities for the on-site training.
  - Sacramento County will provide access to the on-site training venue for Calabrio resources
- Training
  - Sacramento County will participate in training sessions.
- Consulting
  - Participate in consulting sessions

#### To begin this project, the County must:

Approve this County Purchase, and

Provide the corresponding approved Advance Planning Document (APD) from the Office of Technology and Solutions Integration (OTSI) that supports this purchase to proceed with this County Purchase by **May 17<sup>th</sup>, 2025**. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.

#### Services are assumed to begin when the following are completed:

- County approves this County Purchase
- Consortium approves this County Purchase

## 4. TOTAL ESTIMATED CHARGES

Total estimated charges are shown below. These are estimates based on information available as of the date of submission of this County Purchase document.

The total amount of this county purchase for is **\$12,600**, which can be found in the table below.

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Items	Costs during SFY 24/25
Calabrio WFM Training	\$9,792
Calabrio Consultant Travel Costs	\$2,808*
Total Cost	\$12,600

\* Travel cost is just an estimate – it will be charged afterwards on the actual cost basis.

\*\* All prices exclude VAT/GST/local sales or other taxes and duties.

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#### COUNTY PURCHASE APPROVAL

**Subject:** Sacramento Calabrio Training

The subject document is accepted as allowing Gainwell Technologies to proceed with the subject County Purchase.

**Sacramento County**

By: Ethan E. Dye  
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Printed Name: Ethan Dye\_\_\_\_\_

Title: Director

Date: 4/17/2025

**Notice Address:**

County of Sacramento Department of Human Assistance  
1825 Bell St Suite 200  
Sacramento, CA 95825

**Sacramento County Counsel**

By: Robert Parrish  
9DD9ED87E2F4478...

Printed Name: Robert Parrish

Title: Attorney

Date: 4/23/2025

**Notice Address:**

County of Sacramento Department of Human Assistance  
1825 Bell St  
Sacramento, CA 95825



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CalSAWS Consortium

Signed by:  
By: Holly Murphy  
89B392A87EF54EB...  
Holly Murphy  
Printed Name: \_\_\_\_\_  
Chief Administrative Officer  
Title: \_\_\_\_\_  
5/16/2025  
Date: \_\_\_\_\_

**Notice Address:**

CalSAWS Consortium  
620 Roseville Parkway  
Roseville, CA 95747

Gainwell Technologies

Signed by:  
By: Dawn Wilder  
B3831DDEBD9E4A1...  
Dawn Wilder  
Printed Name: \_\_\_\_\_  
Account Delivery Executive  
Title: \_\_\_\_\_  
5/16/2025  
Date: \_\_\_\_\_

**Notice Address:**

Gainwell Technologies  
620 Roseville Parkway  
Roseville, CA 95747



California Health and Human Services Agency  
Office of Technology & Solutions Integration  
Statewide Automated Welfare System (SAWS) Project  
2525 Natomas Park Drive, Suite 370  
Sacramento, California 95833  
(916) 263-3900, Fax (916) 263-0510



GAVIN NEWSOM  
GOVERNOR

May 12, 2025

Crystal Jacques  
Department of Human Assistance  
Sacramento County  
1825 Bell Street, Suite 210  
Sacramento, CA 95825

**Re: Sacramento County CalSAWS Calabrio Training APD FY 2024-25**

Dear Ms. Crystal,

This letter approves your Fiscal Year (FY) 2024-25 request received May 07, 2025 to purchase IT Services for the Sacramento Department of Human Assistance. I understand that this acquisition will be sole-sourced through CalSAWS in accordance with State and Federal procurement policies.

Estimated one-time maintenance and operations costs in the amount of **\$12,600.00** are approved.

This approval is contingent upon the availability of state and federal funds. For claiming purposes, *this approval is for M&O costs only. **These costs are not eligible to be claimed as developmental costs**. Account # (APD Project #) **34A-25-14605** has been assigned as a project identification number for your claiming within the County Expense Claim Reporting Information System (CECRIS), internal tracking, and audit purposes. Please now utilize this project number when claiming M&O costs in CECRIS.* If you have questions regarding the claiming of costs, please e-mail them to [fiscal.systems@dss.ca.gov](mailto:fiscal.systems@dss.ca.gov)

If you have other questions or concerns, please contact Sudakshina Biswas at (916) 263-0478 or [Sudakshina.Biswas@otsi.ca.gov](mailto:Sudakshina.Biswas@otsi.ca.gov)

Sincerely,

DocuSigned by:  
  
BCC5804802F141C

Patrice Yang  
SAWS Project

cc: Analyst, Fiscal Policy Bureau, CDSS  
Analyst, County Expense Claim, CDSS

