

WORK ORDER 20 – BenefitsCal Transition Out Planning

CalSAWS BenefitsCal (Portal/Mobile) Work Order

Table of Contents

1.0	Work Order Submission & Approval Form	3
2.0	Work Order Impact Analysis.....	4
	Transition planning activities anticipated to be requested under this Work Order may include:	4
2.1	Work Order Hours / Fees.....	6
2.1.1	6
2.2	Total Cost	6
2.3	Consortium Responsibilities	7
3.0	Work Order Execution.....	8

1.0 Work Order Submission & Approval Form

Work Order Number	20	
Work Order Title	BenefitsCal Transition Out Planning	
Submitted Date	01/29/26	
Originator	Consortium Request	
Priority	Select the estimated priority level of the requested Work Order: <input type="checkbox"/> Critical – is necessary to avoid potential project stoppage. <input checked="" type="checkbox"/> High – is necessary to avoid potential significant impact to the goals and objectives of the project. <input type="checkbox"/> Medium – is necessary to avoid potential impact to the operational efficiency of project execution. <input type="checkbox"/> Low – needs to be addressed, but the estimated impact to the project is minimal.	
Detailed Description	<p>This Work Order authorizes a fixed capacity of services to support transitioning BenefitsCal maintenance and operations to the new vendor. Deloitte will provide services as requested by the Consortium based on the roles and rates in the Cost Schedule. The total value of all services under this Work Order shall not exceed \$502,630. Deloitte will plan and begin execution for the transition of BenefitsCal operations, knowledge, and responsibilities to the designated incoming vendor. Deloitte will collaborate closely with identified stakeholders to plan and scope out the transition phases – knowledge transfer, shadowing, reverse shadowing to maintain business continuity and support ongoing operations.</p> <p>A detailed description of transition activities will be documented in a Transition-Out Plan, including timelines and responsibilities, after a Transition-in Plan is received from the incoming vendor.</p>	
Review Date		
Type of Work Order	<input type="checkbox"/> Fixed Fee	<input checked="" type="checkbox"/> Time & Material

2.0 Work Order Impact Analysis

Describe the changes required to support this Work Order by resource type and provide a brief description of work to be completed.

Design Impact	<ul style="list-style-type: none"> None
Development	<ul style="list-style-type: none"> None
Testing	<ul style="list-style-type: none"> None
Performance Testing	<ul style="list-style-type: none"> None
Scope	<p>Transition planning activities anticipated to be requested under this Work Order may include:</p> <ul style="list-style-type: none"> Establishing Transition Timeline: Creating an agreed-upon transition plan that details transition schedules, deliverables, milestones, risk mitigation approaches, and communication protocols based on the incoming vendor's Transition-in Plan. Knowledge Transfer: Planning for transfer of process knowledge, and system configurations as requested by the incoming vendor, and conducting knowledge transfer sessions. Job Shadowing: Planning to facilitate structured shadowing sessions as requested by the incoming vendor, and conducting job shadowing sessions. Supporting Document Requests: Provide existing artifacts as requested by the incoming vendor. Transition Status Reporting: Delivering regular status updates to stakeholders to track progress, highlight risks, and escalate issues as needed.
Communications	<ul style="list-style-type: none"> None
Security	<ul style="list-style-type: none"> None
Software/Licenses	<ul style="list-style-type: none"> None
Deliverables (New and Updated)	<ul style="list-style-type: none"> Transition Out Plan and Schedule
Schedule	<ul style="list-style-type: none"> None
Other	<ul style="list-style-type: none"> None

Assumptions	<ul style="list-style-type: none">• Hours associated to the tasks related to any transition out activities will be pre-approved by the Consortium based on an agreed upon mechanism for pre-approval.• The Consortium will provide timely access to necessary systems, documentation, and personnel.• The incoming vendor will assign resources and participate as scheduled in transition activities.• The Consortium is responsible for provisioning required credentials and approvals for the incoming vendor.• Post-transition support will be assumed by the incoming vendor after the agreed cutover date.• Consortium will not request services that exceed the not to exceed amount and capacity.• Transition Out Plan and Schedule shall be contingent on the incoming vendor's Transition-In Plan and a mutually agreed upon DED and timeline.• The activities to be conducted as described in this Work Order are contingent upon the Transition-In Plan provided by the incoming vendor, mutually agreed upon Knowledge Transfer threads, phases, logistics, and target completion dates for the threads, in order to avoid disruption of ongoing BenefitsCal operations.
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2.1 Work Order Hours / Fees

2.1.1 Estimated hours required to support this Work Order (Transition) by resource type and provide a brief description of work to be completed, if applicable summarized below:

Type	Description	Rate	Hours*	Amount
Project Management	Transition Out Manager	\$236.07	175	\$41,312.00
Project Management	PMO Analyst	\$126.27	280	\$35,355.60
Design	Business Analyst	\$115.29	240	\$27,669.60
Design	UI/UX Design Analyst	\$164.70	240	\$39,528.00
Design	UCD Research Analyst	\$148.23	240	\$35,575.20
Design	Functional Lead	\$164.70	240	\$39,528.00
Design	UI/UX Design Lead	\$164.70	240	\$39,528.00
Design	UCD Research Lead	\$164.70	240	\$39,528.00
Development	Sr. Business Analyst	\$144.24	280	\$40,387.20
Development	App Dev Lead	\$137.25	280	\$38,430.00
Security	Security Engineer	\$142.74	280	\$39,967.20
Test	Test/QA Lead	\$109.80	280	\$30,744.00
Test	Tester	\$72.47	380	\$27,538.60
Test	Tester	\$72.47	380	\$27,538.60
Total			3,775	\$502,630.00

* Actual hours and the distribution are subject to change based on the activities approved by the Consortium and the resources involved in those activities.

2.2 Total Cost

The following table outlines the total charges for this Work Order.

Total BenefitsCal One-Time Services Charges	SFY 2026/27	Total Charges
BenefitsCal One-Time Services Charge	\$502,630.00	\$502,630.00
Recurring BenefitsCal One-Time Services Charge	\$0.00	\$0.00
Hardware and Software Charges	\$0.00	\$0.00
Hardware Charges	\$0.00	\$0.00
Hardware Maintenance and Support Charges	\$0.00	\$0.00
Software Charges	\$0.00	\$0.00
Software Maintenance and Support Charges	\$0.00	\$0.00
Production Operations Charges	\$0.00	\$0.00
One Time Charges	\$0.00	\$0.00
Recurring Charges	\$0.00	\$0.00
Total Charges	\$502,630.00	\$502,630.00

Recurring BenefitsCal Services as defined in this Work Order will be worked and invoiced on a monthly basis according to the rates and charges in the pricing schedule.

Invoice submissions require WAC and approval from the Consortium. The WAC date and the invoice submission date will need Project Manager agreement.

Enter any deliverable(s) which will be created to support this Work Order. Deliverables listed below will be provided to support this Work Order and upon approval of the Work Order are considered to be part of **Section 5.2 – Portal/Mobile App Deliverables and Services**.

#	Deliverable Title	Description	Deliverable Submission Date
1	DEL WP 28 Work Plan	Updates to the work plan to include work required to implement this Work Order.	03/06/26
2	DEL Transition-Out Plan	Detailed description of Transition-Out services.	03/06/26

2.3 Consortium Responsibilities

If applicable, specify work(s) which will be supported by the Consortium for this Work Order.

Work	Work Description
	<ul style="list-style-type: none"> Review and approve deliverable updates. Communications with the Stakeholders.

3.0 Work Order Execution

IN WITNESS WHEREOF, the Consortium has caused this Work Order to be subscribed on behalf of the Consortium and Contractor has caused this Work Order to be subscribed on its behalf by its duly authorized officer, as indicated below.

DELOITTE CONSULTING LLP

Dated: _____

By: _____

Name: Michael Green

Title: Deloitte Principal

CALSAWS CONSORTIUM

Dated: _____

By: _____

Michael Sylvester, Consortium Chair

By: _____

Julia Erdkamp, Consortium Executive
Director

Approved as to form:

By: _____

Kronick Moskowitz Tiedemann & Girard,
Consortium Legal Counsel