



California Statewide Automated Welfare System



Analytics Modernization

Statement of Work

Attachment 1 to Change Order Number 5,
Inclusive of

Attachment 2 Deloitte M&E Analytics Modernization_Pricing Schedule.xlsx
February 20, 2026

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Analytics Modernization Statement of Work

1 INTRODUCTION AND OVERVIEW

For the purposes of this Attachment 1 ("Statement of Work" or "SOW") to Change Order Number 5 to the Maintenance & Enhancements (M&E) Services Agreement ("Agreement") for the California Statewide Automated Welfare System ("CalSAWS") Consortium ("Consortium"), the meaning of all terms used in this SOW shall have those meanings as set forth in the Agreement, unless otherwise specified therein. Furthermore, all Work performed pursuant to this SOW shall be subject to the terms and conditions of the Agreement, unless otherwise expressly stated in this SOW.

The CalSAWS Consortium has requested Deloitte to provide and maintain Analytics Platform during SFY 25-26, and SFY 26-27, as further described below in this SOW.

1.1 Schedule

The term of this SOW shall commence on March 2, 2026 and continue through January 31, 2028. The estimated effort, prices, and assumptions for this SOW are set forth in Attachment 2, Deloitte M&E Analytics Modernization Pricing Schedule.

2 STATEMENT OF WORK

This section describes the Work that Deloitte will perform under this SOW. Deloitte will provide resources during the term of this SOW to support Analytics Platform with the following tasks mentioned in Table 1 below. The design and development for this project will be performed iteratively, organized by functional domain (e.g., case management, applications, workload management, and benefit issuance). Deloitte will collaborate with the County's existing workgroups and committee governance to obtain early and recurring feedback on the reports and dashboards developed under this effort. A project work plan will be developed to further define the iterative development cycles, as well as to clearly define responsibilities and dependencies between the various stakeholders.

Table 1: Scope

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
1	Core Operational Analytics - Architecture & Design Complete	<ul style="list-style-type: none">■ Deliverable: Architecture Design Document signed off by the Consortium establishing a Modern Data Lake Architecture Foundation for the CalSAWS Analytics Data Lakehouse Solution including data architecture showing the various layers of the architecture(Data ingestion layer- Bronze Layer, Curated Layer – Silver and the Data Products layer - Gold

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
		<p>layer), storage, Data governance using data catalog and its configuration, and the security architecture</p> <ul style="list-style-type: none"> ■ Deliverable: Logical and Physical Data Model for up to 4 Data Domains Case, Application, Program, and Workload along with Data Standards ■ Set up and configure the Dev/Test/Pre-Prod and Prod Environments for the Lakehouse development, design and implementation including configuration of the Databricks and reporting (power BI or equivalent) environment and the deployment pipelines necessary to support development, testing and production activities ■ Design Data Pipelines needed to ingest data from CalSAWS core application system and support the report development for up to 4 Data Domains such as Case, Application, Program, and Workload Data Domains ■ Design operational and management reports and visualizations after the rationalization based on usage for above domains to effectively replace existing Qlik based reports for those Domains where all attributes and metrics in actively used Qlik report will be available in the new system as identified in the requirements validation and confirmation process. Actively used reports/attributes/metrics will be defined in collaboration with the Consortium. ■ Develop Approach and Design for Data Observability
2	Core Operational Analytics - Build Complete	<ul style="list-style-type: none"> ■ Build Data Pipelines designed in the Phase 1 Design ■ Build the capability to allow counties to ingest CalSAWS generated analytics data models designed in the Phase 1 design ■ Build Operational Reports designed in the Phase 1 Design

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
		<ul style="list-style-type: none"> ■ Build a Self-Service Reporting Capability for the Above Domains, Including: <ul style="list-style-type: none"> • The ability for users to modify existing reports and dashboards by incorporating additional data elements or metrics, limited to those that are available within the published data products. ■ Ability to query data using natural language —leveraging the “Data Genie” feature in Databricks—to address ad-hoc questions, limited by the features and constraints inherent to the underlying tools. ■ Build Data Observability Dashboard including ability to monitor production and lower environment to quickly detect and resolve issues, if any. ■ Plan and prepare for training for reports and dashboards developed in this milestone ■ Deliverable: Test Plan signed off by the Consortium
3	Core Operational Analytics – Testing Complete	<ul style="list-style-type: none"> ■ Test the Data Pipelines built in the Phase 1 Build as per the test plan that will be developed as the part of the project ■ Test Operational Reports built in the Phase 1 Build per the test plan ■ Test Self-Service reporting for above domains per the test plan ■ Validate row-level/column-level security, masking, and access controls work as defined in the requirements document ■ Develop the CI/CD pipelines for code deployment. ■ Deploy the code to Dev and Test environments and work with Infrastructure vendor to promote the code to higher environments.

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
		<ul style="list-style-type: none"> Develop training materials
4	Expanded Operational and Management Analytics - Design Complete	<ul style="list-style-type: none"> Design Data Pipelines needed to ingest data from CalSAWS core application system and support the report development for up to 3 Data Domains such as Issuance & recovery, Provider, Audit Design Operational and management reports and visualizations for above domains to effectively replace existing Qlik based reports for those Domains where all attributes and metrics in actively used Qlik report will be available in the new system as identified in the requirements validation and confirmation process. Actively used reports/attributes/metrics will be defined in collaboration with the Consortium. Expand the design for Data Observability for additional domains in Phase 2
5	Expanded Operational and Management Analytics - Build 1 Complete	<ul style="list-style-type: none"> Build Data Pipelines designed in the Phase 2 Design Build Operational Reports designed in Phase 2 Design Build Self-Service reporting capability for above domains Expand Observability Dashboard to cover for the Phase 2 scope including ability to monitor production and lower environment to quickly detect and resolve issues if any Plan and prepare for training for reports and dashboards developed in this milestone
6	Expanded Operational and Management Analytics - Testing Complete	<ul style="list-style-type: none"> Test the Data Pipelines built in the Phase 2 Build per the test plan that will be developed as the part of the project Test Operational Reports built in the Phase 2 Build as per the test plan Test Self-Service reporting for above domains as per the test plan

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
		<ul style="list-style-type: none"> ■ Validate row-level/column-level security, masking, and access controls work as defined in the requirements document ■ Develop the CI/CD pipelines for code deployment. ■ Deploy the code to Dev and Test environments and work with Infrastructure vendor to promote the code to higher environments. ■ Develop training materials
7	Unified Customer 360 - a holistic view of a member across programs, time, and interactions, designed to improve eligibility accuracy, service delivery, client experience & Cross-Source Analytics: Design Complete	<ul style="list-style-type: none"> ■ Design Data Pipelines needed to ingest data from BenefitsCal, Contact Center, Lobby and Imaging to support cross source visualization development ■ Design Customer 360 Data Model ■ Design up to a maximum of 40 new visualizations for cross source analytics including visualization to support Customer 360 that will show the view of the customer/member across programs, time and interactions ■ Design MDM approach to create a consolidated view of the customer across sources
8	Unified Customer 360 & Cross-Source Analytics: Build Complete	<ul style="list-style-type: none"> ■ Build Data Pipelines (Transformation and Load) designed in the Phase 3 Design ■ Build Reports designed in Phase 3 Design ■ Build Self-Service reporting capability for above domains ■ Continue to monitor production and lower environment to quickly detect and resolve issues if any ■ Build a consolidated identifier for the customer. This does not include deduplication, merging or unmerging of customer records. ■ Plan and prepare for training for reports and dashboards developed in this milestone
9	Unified Customer 360 & Cross-Source	<ul style="list-style-type: none"> ■ Test the Data Pipelines for functional requirements built in the Phase 3 Build

MILESTONE NUMBER	MILESTONE NAME	DESCRIPTION
	Analytics: Testing Complete	<p>as per the test plan that will be developed as the part of the project</p> <ul style="list-style-type: none"> ■ Test Reports built in the Phase 3 Build as per the test plan ■ Test Self-Service reporting for above domains as per the test plan ■ Validate row-level/column-level security, masking, and access controls work as defined in the requirements document ■ Develop the CI/CD pipelines for code deployment. ■ Deploy the code to Dev and Test environments and work with Infrastructure vendor to promote the code to higher environments. ■ Develop training materials

3 ASSUMPTIONS

The SOW is based upon the following assumptions:

Table 2: Assumptions

NUMBER	ASSUMPTION
1	Databricks Lakehouse and a Visualization/Reporting Tool software is procured by Consortium and available to Deloitte for use per a mutually agreed project plan.
2	Cloud environment & Lakehouse POC environment will be provisioned by Consortium and accessible to Deloitte by end of February 2026 until the actual Dev, Test, Pre-Prod and Prod environments are made available.
3	All of the current data as available within the CORE CalSAWS transactional system will be extracted and loaded into the Analytics environment. Retention of data ingested and created within the Analytics system will be per CalSAWS retention policy. "Current" data includes all the data that is available in the primary transactional tables (including active and closed cases) and only excludes data that has been moved into history or archive tables
4	SMEs from systems and Counties along with Business users will be available and actively participate in design reviews, dashboard walkthroughs, and validation cycles.

NUMBER	ASSUMPTION
5	Up to a maximum of 600 source objects from Core CalSAWS application and other sources (such as BenefitsCal, Lobby) need to be ingested into the Data Lake in Phase 1 and Phase 2.
6	Work performed under this SOW shall be billed on a milestone basis as set forth in Attachment 2 Deloitte M&E Analytics Modernization Pricing Schedule.
7	Any change of scope will be mutually agreed to in writing via future Change Order.
8	Reports and visualizations currently on Qlik can be rationalized to a lower count based on current usage by eliminating redundant reports or consolidating similar reports. Only actively used reports will be migrated over to the new platform. Active Reports will be defined in collaboration with the Consortium.
9	For the Customer 360 and MDM design, Person record from the Core CalSAWS application as identified by the PERS-ID will be the primary driver where available. The design will incorporate an ability to allow for external (non-CalSAWS person) to be a part of the customer 360 solution as well. Details of the person object including its universal identifier will be finalized during the design phase
10	Source Data quality related remediation will not be performed in the Analytics system. Ownership of source Data quality issues will lie with the source system. Deloitte will, however, be responsible for implementing Data quality observability within the Analytics platform including Data quality checks, monitoring, alerting, and implement mechanisms to flag Data quality issues and quarantine them where appropriate. Deloitte will also provide mechanisms to quantify those issues and make those issues visible to the business. Source data quality Issues discovered while transforming the data for reports, will be reported back to the source system owners. A RACI matrix will be developed as a part of project planning to clarify responsibilities related to data quality remediation
11	Develop the interface definition document and collaborate with additional source vendors to obtain up to 20 extracts from Contact Center, 5 extracts from imaging, and up to 50 extracts from BenefitsCal. These will be ingested into the Analytics platform for cross source analytics.
12	Infrastructure vendor will need to provide access to necessary APIs to build observability platform capable of monitoring all environments (including Production and Pre-Prod).

NUMBER	ASSUMPTION
13	Effort estimates assume the use of Generative AI-enabled tools (e.g., Claude or equivalent subject to Consortium reviews and approvals) to support selected SDLC activities such as analysis, design assistance, coding, testing support, and documentation. All AI-assisted outputs will be reviewed, validated, and approved by qualified project personnel, with humans remaining accountable for all deliverables and outcomes.
14	CalSAWS Data / IT team will be responsible for collecting requirements from the counties and the Consortium. CalSAWS Data / IT team will also drive active participation in UAT and other county user validation cycles.
15	<p>As part of the engagement, Deloitte will coordinate with the Consortium to develop a mutually agreed upon Training Plan based on the needs identified during the requirements and design phases of the project.. The Training Plan will include roles and responsibilities specifying who is responsible for the development and delivery of Training (e.g., Consortium, Deloitte, etc.).</p> <p>Training will focus on accessing and consuming reports on the new data platform and using available self-service features. Examples of Training materials may include virtual or in-person instructor-led training, job aids, quick reference guides, and web-based training. This approach is intended to enable the Consortium team to deliver additional end-user training as needed. Sessions will be recorded and will be made available to users to refer to as needed. Ongoing reoccurring training is outside the scope of this engagement unless otherwise specified.</p>
16	<p>As part of the engagement, Deloitte will coordinate with the Consortium to develop a mutually agreed upon OCM strategy and plan. Example activities may include conducting a change impact assessment, providing a change impact report with recommended mitigation strategies, developing and managing tactical communications and stakeholder engagement plans, and monitoring continuous improvement opportunities through qualitative and quantitative data.</p> <p>The OCM Plan will define the specific services and artifacts to be delivered as determined by the needs identified during the requirements and design phases of the project.</p>

4 PRICING

Pricing details for the scope of this Statement of Work are defined in Attachment 2 Deloitte M&E Analytics Modernization Pricing Schedule.