

## WORK ORDER 23 – BenefitsCal Transition Out Execution and Closing

# CalSAWS BenefitsCal (Portal/Mobile) Work Order

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**1.0 Work Order Submission & Approval Form**

<b>Work Order Number</b>	23	
<b>Work Order Title</b>	BenefitsCal Transition Out Execution and Closing	
<b>Submitted Date</b>	05/15/26	
<b>Originator</b>	Consortium Request	
<b>Priority</b>	<p>Select the estimated priority level of the requested Work Order:</p> <p><input type="checkbox"/> Critical – is necessary to avoid potential project stoppage.</p> <p><input checked="" type="checkbox"/> High – is necessary to avoid potential significant impact to the goals and objectives of the project.</p> <p><input type="checkbox"/> Medium – is necessary to avoid potential impact to the operational efficiency of project execution.</p> <p><input type="checkbox"/> Low – needs to be addressed, but the estimated impact to the project is minimal.</p>	
<b>Detailed Description</b>	<p>This Work Order authorizes a fixed capacity of services to support the transition of BenefitsCal maintenance and operations to the new vendor, as well as to facilitate the close-out of the existing contract. Deloitte is engaged to provide services as requested by the Consortium, in accordance with the roles and rates outlined in the work order hours and fees. Additionally, Deloitte will procure and facilitate payment for the renewal of Amplitude and MEDALLIA as directed by the Consortium to prevent service disruption during the transfer of these responsibilities to the Consortium or the new vendor. The total value of all services under this Work Order shall not exceed \$619,372.</p> <p>Deloitte will continue executing transition activities, including the transfer of BenefitsCal operations, knowledge, and responsibilities to the designated incoming vendor. The team will collaborate closely with identified stakeholders to plan and scope transition phases such as knowledge transfer, shadowing, and reverse shadowing, ensuring business continuity and ongoing operational support throughout the process.</p> <p>Contract close-out activities will be performed in partnership with the Consortium, following an agreed-upon approach to ensure a smooth and compliant transition.</p>	
<b>Review Date</b>		
<b>Type of Work Order</b>	<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"> <li>None</li> </ul>
Development	<ul style="list-style-type: none"> <li>None</li> </ul>
Testing	<ul style="list-style-type: none"> <li>None</li> </ul>
Performance Testing	<ul style="list-style-type: none"> <li>None</li> </ul>
Scope	<p>Transition planning activities anticipated to be requested under this Work Order may include:</p> <ul style="list-style-type: none"> <li><b>Maintain Transition Timeline:</b> Maintain and manage the agreed-upon transition plan that details transition schedules, deliverables, milestones, risk mitigation approaches, and communication protocols.</li> <li><b>Knowledge Transfer:</b> Continue providing the transfer of process knowledge, and system configurations as requested by the incoming vendor.</li> <li><b>Job Shadowing:</b> Continue facilitating the structured shadowing sessions as requested by the incoming vendor.</li> <li><b>Reverse Job Shadow</b> – Facilitate the structured reverse shadowing sessions as requested by the incoming vendor.</li> <li><b>Transition Status Reporting:</b> Provide regular status updates to stakeholders to track progress, highlight risks, and escalate risk and issues as needed.</li> </ul> <p>Process the upcoming license renewal of the following tools:</p> <ul style="list-style-type: none"> <li><b>Amplitude</b> – To monitor end user usage of the BenefitsCal system and performance and usability experience.</li> <li><b>MEDALLIA</b> - To capture end user feedback.</li> </ul>
Communications	<ul style="list-style-type: none"> <li>None</li> </ul>
Security	<ul style="list-style-type: none"> <li>None</li> </ul>
Software/Licenses	<ul style="list-style-type: none"> <li>None</li> </ul>
Deliverables (New and Updated)	<ul style="list-style-type: none"> <li>Close out Library</li> </ul>
Schedule	<ul style="list-style-type: none"> <li>None</li> </ul>

Other	<ul style="list-style-type: none"> <li>• None</li> </ul>
Assumptions	<ul style="list-style-type: none"> <li>• The incoming vendor will request and schedule the session upon agreement with Deloitte.</li> <li>• Post-transition support will be assumed by the incoming vendor after the agreed cutover date.</li> <li>• All parties will adhere to the Consortium security, compliance, and privacy requirements.</li> <li>• Consortium will not request services that exceed the not to exceed amount and capacity.</li> <li>• Contract close-out processes will be executed in accordance with mutually agreed procedures between Deloitte and the Consortium.</li> <li>• All transition and close-out activities will comply with applicable regulatory and contractual requirements.</li> <li>• Any changes to the scope, schedule, or costs will require formal approval from the Consortium.</li> <li>• Deloitte will proceed with renewing the Amplitude and Medallia licenses and formally transfer them to the Consortium. The Consortium will then assume responsibility for managing these licenses following the renewal.</li> </ul>

## 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	Role Description*	Rate	Hours*	Amount
Project Management	Transition Out Manager	\$236.07	260	\$61,378.20
Project Management	PMO Analyst	\$126.27	280	\$35,355.60
Design	Business Analyst	\$115.29	200	\$23,058.00
Design	UI/UX Design Analyst	\$164.70	220	\$36,234.00
Design	UCD Research Analyst	\$148.23	320	\$47,433.60
Design	Functional Lead	\$164.70	250	\$41,175.00
Design	UI/UX Design Lead	\$164.70	210	\$34,587.00
Design	UCD Research Lead	\$164.70	255	\$41,998.50
Development	Sr. Business Analyst	\$144.24	318.5	\$45,940.44
Development	App Dev Lead	\$137.25	315	\$43,233.75
Security	Security Engineer	\$142.74	201.5	\$28,762.11
Test	Test/QA Lead	\$109.80	200	\$21,960.00
Test	Tester	\$72.47	215	\$15,581.05
<b>Total</b>			<b>3,245</b>	<b>\$476,697.25</b>

\* Actual hours, role and 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	\$0.00	\$0.00
Recurring BenefitsCal One-Time Services Charge	\$476,697.25	\$476,697.25

## CalSAWS – BenefitsCal (Portal/Mobile) Project

### Work Order 23: BenefitsCal Transition Out Execution and Closing

<b>Hardware and Software Charges</b>	<b>\$142,674.52</b>	<b>\$142,674.52</b>
Hardware Charges	\$0.00	\$0.00
Hardware Maintenance and Support Charges	\$0.00	\$0.00
Software License Charges	\$142,674.52	\$142,674.52
Software Maintenance and Support Charges	\$0.00	\$0.00
<b>Production Operations Charges</b>	<b>\$0.00</b>	<b>\$0.00</b>
One Time Charges	\$0.00	\$0.00
Recurring Charges	\$0.00	\$0.00
<b>Total Charges</b>	<b>\$619,371.77</b>	<b>\$619,371.77</b>

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 table above.

Invoice submissions require WAC and approval from the Consortium. The milestone date, 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	Close out Library	CalSAWS SharePoint library with all close out documentations	8/15/2026

### 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"><li>• Review and approve deliverable updates.</li><li>• Communications with the Stakeholders.</li></ul>

### 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: \_\_\_\_\_

Marla Stuart, Consortium JPA Vice-Chair

By: \_\_\_\_\_

Julia Erdkamp, Consortium Executive  
Director

Approved as to form:

By: \_\_\_\_\_

Kronick Moskowitz Tiedemann & Girard,  
Consortium Legal Counsel