

A proposed model for the Collaboration Model Team

Prioritizing BenefitsCal Enhancements

Dear Partners,

We are grateful for the opportunity to work together in the Collaboration Model Team for BenefitsCal Priorities. We are excited about the promise of BenefitsCal to be the best public benefits application in the country and have been working towards this goal in partnership with all of you since 2019.

This document is intended to elevate a vision for the prioritization of BenefitsCal enhancements with an emphasis on a methodology that allows for a sustainable and focused review of enhancements for all stakeholders. This model is in draft form, pending exploration of additional questions, feedback from stakeholders, and recommendations.

Purpose of our Proposed Approach

We deeply value the commitment and intention of the stakeholders participating in the BenefitsCal Collaboration Model.

As we consider how to create a sustainable process for assessing the priorities, we realized that if each enhancement that is currently on the list is taken one by one, this process could take up more time that stakeholder partners have available, thus limiting the potential to successfully achieve our overarching goal: ensuring BenefitsCal meets the needs of all users.

For example, why change copy on one page this month and then change copy on the next page six months from now? Further, why do this without a set style guide that would improve consistency across the application?

Our proposed approach intends to provide a framework for assessing enhancement requests as part of overall product development and improvement. Using specific overarching objectives for the consumer and county experience as “buckets,” we can sort enhancements and assess them as part of the broader scope of our goal.

By consolidating the enhancements into groups to be prioritized together, we can create meaningful and consistent change in BenefitsCal, thus moving forward larger bodies of work that have real impact, and gaining long term wins much more quickly.

Bringing forth this vision is intended to be an opportunity for stakeholders to respond to the proposed ideas with possible improvements and ideas to ensure the process can meet the group’s needs. We look forward to learning more about how this idea can be explored in context with existing processes for CalSAWS changes and Releases.

Outline of our Recommended Methodology

1. Conduct a thorough and holistic review of the enhancements list before ongoing prioritization. The goal of this review would be to sort and consolidate like-enhancements, identify common and emerging themes, and categorize enhancements by technical “type.” (See examples in Exhibit I)
2. Next, establish high-level, consumer-centric objectives (or “buckets”) for BenefitsCal enhancements. These are framed as “goals” to elevate user needs in decision making. (See examples in Exhibit II)
3. Estimate the impact of the enhancements on the consumer and eligibility worker experience.
4. Assign a “t-shirt size” (S, M, L) estimation of effort (time and cost)
5. Group enhancements and prioritize them into upcoming Releases by using the assessment matrix (from steps 3 and 4) plus feedback from CM stakeholders.
6. With this approach, we can create a BenefitsCal Roadmap that can streamline the group’s overall work with pre-defined and flexible goals for our approach to prioritization. This road map can be assessed and amended each quarter as new enhancements are raised and priorities evolve.

Exhibit I

Possible “Types” for Enhancement Categorization

1. Technical issues/Functionality
2. Design of the website

Exhibit II

Possible “Buckets” Framed as Goals

1. Improving the application process
2. Improved options for doc submission
3. Support for historically under-served populations
4. Support for program compliance
5. Create data for ongoing improvements

See Appendix I for an infographic of the model.

Moving Priorities Forward

We request that for each planned Release, dedicated space is made available for recommendations from the group. We understand there are many competing priorities and hope that by working collaboratively we can ensure each Release will have productive and impactful changes for BenefitsCal.

As part of the Roadmap, we request an assessment of completed changes. This assessment should include feedback from stakeholders using the system to share if the change has met the intended need or if other changes are needed. Changes should not be considered “closed” until they meet the intended purpose of the enhancement request. Using this method, we can ensure that BenefitsCal continues to evolve to meet the needs of users.

Outstanding Questions for CM Group Consideration

1. Does this proposed approach reflect the vision that CalSAWS has been considering? If not, can we explore the various approaches to find agreement on a path forward?
2. Is the Release cadence for BenefitsCal intended to follow the existing CalSAWS Release cadence (odd months)?
3. What is the expected capacity for the Releases in terms of accommodating the CM Group Priorities.
4. Is the SPG process from 2019 still in effect? Can we get an update on the overall process for how items are accommodated into broader Release Planning (eg, changes for CalSAWS or policy requirements)?
5. When can we discuss the model for how priorities, once identified by the CM group, will move through the broader (SPG?) process for Release scheduling?

Appendix I: Infographic of the Proposed Enhancement Prioritization Model

Proposed Process for BenefitsCal Enhancement Prioritization and Implementation



1 Thorough & Holistic Review of all Open Enhancements



Sub-Committee of Stakeholders would work together to:

- Consolidate Duplicate/Similar Enhancements
- Identify Common Themes
- Categorize Enhancements by Technical "Type"

2 Establish and Organize Enhancements by Prioritized High-Level, Consumer-Centric Objectives



Sub-Committee would propose objectives to be affirmed by the **CM Team**. Examples could include:

- Increased Efficiency in Application Process
- Improved Options for Document Submission
- Reduction in Churn, etc.

Objective A Objective B Objective C Objective D

3 Determine Impact of Enhancements



Stakeholders would assess impact (High, Medium, Low) from their various points of view:

- Number of Consumers Impacted (Breadth)
- Benefit of Process Improvement (Depth)

4 Assign "T-Shirt Size" Effort to Enhancements



CalSAWS Project Staff would develop estimates for Effort (Time and Money)

- Employ "t-shirt sizing"
- Provide information and/or review with stakeholders

5 Use Steps 1-4 to Develop a Matrix To Prioritize & Slot Enhancements into Planned Releases



The **CM Team** would use the assessment to create a matrix by which the individual enhancements (and possibly the Objectives) can be prioritized. For example, if the "Reducing Churn" Objective is assessed as a high priority, the group would then use the matrix to prioritize the related enhancements.

BenefitsCal Product Roadmap



Consumer-Centric Objectives would be planned sequentially in prioritized order. This would form the Product Roadmap. New enhancements would be evaluated by the **CM Team** each quarter, using the same criteria as the initial review and slotted into the upcoming releases.

This model was developed by the CBO and Assister Group with feedback from at least one customer.