To:
Michael Sylvester, Bureau Director and Chief Information Officer
 Los Angeles County Department of Public Social Services
John Boule, Executive Director, CalSAWS Project

February 21, 2023

Re: CalSAWS/BenefitsCal Engagement with Stakeholders

This communication summarizes the opportunities to strengthen our partnership and better ensure that the Project is able to meet the requirements of WIC 10823.1, 10823.2 and 10823.3.

We recognize that moving forward a highly complex and time sensitive project such as the CalSAWS Migration necessitates difficult decision making and prioritization.

Our comments and recommendations, summarized into four sections in this memo, are intended to initiate a conversation to identify where our efforts can be strengthened so that we can collaboratively design solutions that will support the best possible outcomes for consumers.

Sincerely,
Advocate Co-Leads
Jennifer Tracy, Liz Ramirez, Marcia Garcia.

<u>Consumer Experience</u>
Consumers have experienced foreseen and unnecessary barriers to accessing services through the BenefitsCal website as counties have migrated. These barriers have resulted in consumers losing benefits, running out of food, and having to use their limited resources to go to their county health and human services office to get help.

As we prepare for Medi-Cal renewals starting in April, with more than 15 million consumers at risk of losing coverage, we are bringing forward the urgency to address multiple barriers.

<u>Recommendations to improve the consumer experience:</u>
1. Add an account creation process that does not require an email address.
2. Work collaboratively with stakeholders and county staff to assess the options for access for Domestic Violence survivors and ensure that training is provided to staff as part of their training experience.
3. Identify a timeline and process for implementing direct, public-facing technology support (not behind the layers of county call centers).
4. Collaboratively review with stakeholders the training materials and "help" sections on the BenefitsCal website and plan to update them regularly as a matter of usual business (not through the enhancements team process).

The Enhancements Team

The CalSAWS Project, in December 2021[1], suggested a collaboration model to prioritize hundreds of backlogged functionality requests (also called "enhancements").

The group, called the "Collaboration Model Enhancements Team," launched in April 2022. To date, it lacks a charter and has no strategic vision for assessing and prioritizing the growing list of more than 400 requests. Stakeholders have made several efforts to meet the collaborative intent of the group, but there is a lack of confidence that stakeholder time and effort are being effectively utilized and the process itself does not reflect best practices.

Recommendations for the Enhancements Team

1. Partner with stakeholders to develop a truly collaborative process that includes a strategic road map informed by Product Management best practices and transparency in decision making. This process should include, at a minimum:
   a. Clear criteria for defining enhancement priority areas
   b. Planned cadence for releases
   c. Established amount of effort to be allocated in each release to the Enhancement Group's priorities
   d. Grouping of similar enhancements to ensure efficient use of resources
   e. Transparency in how identified priorities are moved through the process.
2. Identify a trained product manager to lead the development and maintenance of a product roadmap and facilitate a collaborative approach to prioritization of enhancements among stakeholders.
3. Work with the advocates community to quickly prioritize enhancements that should have been included in the original BenefitsCal designs so that those issues can be made right within the next 18 months.
4. Consider eligibility workers as "users" of BenefitsCal so that their perspectives be included in the design sessions for BenefitsCal functionality.
5. Collaboratively develop a transparent process for public engagement in how priorities are determined for CalSAWS and BenefitsCal enhancements and Releases.

Stakeholder Engagement

2018 legislation required CalSAWS to engage with stakeholders to discuss identified areas of concern and create a formal process for stakeholders to provide input into public facing elements of CalSAWS and its associated systems. However, in response to years of good faith effort, the relationships and engagement in the stakeholder group continue to be strained and lacking in trust or shared decision making.

The process used to engage stakeholders has resulted in most of our feedback being moved to the "backlog list." Every item that is moved to the backlog list because it was brought forward "too late" means that Stakeholders will have to secure hundreds of thousands, if not millions, more dollars from the State to fix things through "enhancements" that should have been

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[1] Per the description at the December 2021 JPA Meeting, see slides 39-49

designed properly in the first place. We are seeing the domino effect of the lack of inclusion as it impacts the client and county experience.

Recommendations
1. Work collaboratively with stakeholders to identify a shared and detailed definition of "public facing" elements of the migration process in order to be in alignment with WIC 10823.1 and 10823.2, and the goals in WIC 10823.3.
2. Share a transparent process of how decisions are being made for BenefitsCal functionality and work collaboratively to ensure that stakeholders are *meaningfully and collaboratively* included.
3. Focus on generative engagement, recognizing stakeholders as partners in the process, avoid characterizations that lead to competitive perspectives, and work from shared interests in building a successful BenefitsCal without unnecessary harm to consumers. A plan for this should be presented to stakeholders.
4. Develop, in partnership with stakeholders, a clear and effective communication strategy to ensure that stakeholders are informed timely and updated regularly regarding aspects of the migration for which they have expressed interest, per WIC 10823.1 and 10823.2
5. Create a shared definition for and practice of "collaboration" that moves beyond "consult and inform" towards a model that maximizes the expertise of all stakeholders. This should include specific practices that are integrated into the full product lifecycle, including design, development, ongoing iteration, and the identification and prioritization of future enhancements.
6. Provide documentation about CalSAWS Project Staff roles and responsibilities, including staff responsibilities related to stakeholder communication and engagement.
7. Collaboratively develop a public-facing dashboard that measures BenefitsCal functionality and outcomes for consumers.
8. Require that future "retrospectives" of public facing aspects of BenefitsCal and the CalSAWS migration use industry-standard approaches, and collaboratively developed goals and outcomes for the activities.

Community Based Organizations
The CBO assister community provides support to populations who have been unable to access benefits on their own. People who are elderly, non-English speaking, immigrants, people with disabilities, and those with limited knowledge and access to technology make up the populations who are least likely to access benefits they need. These individuals most often rely on the CBO community for support in accessing the benefits for which they qualify.

As BenefitsCal has been developed, CBO assisters have lost access to important tools that were previously available to them to serve consumers, increasing the burden on their time and resources. This also adds burden to county staff, who are more likely to see increased case churn and have increased call volumes.

<u>Recommendations</u>
1. Develop a simplified approach for a CBO-facing integrated ROI process that is automated (like the consumer facing version) within the next 6 months. Develop recommendations for a workaround that can allow faster manual implementation in time for the Medi-Cal renewal unwinding starting in April.
2. Make the BenefitsCal "demo site" available at all times for CBO assisters to support the training of their staff.
3. Review the list of requested enhancements for CBO functionality and work with stakeholders to prioritize them over the next 12 months.