

Acknowledgements:

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The toolkit approach was inspired by the toolkit for SSI Expansion in CalFresh advocacy, developed by Becky Gershon from the California Association of Food Banks. We are grateful for her time and expertise.

For more information about this or other CalSAWS advocacy work, please visit our website or contact the CalSAWS co-leads with questions or to request advocacy support:

<http://transformcalfresh.org/resources/saws-migration/>

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What is this toolkit for?

This toolkit provides resources and information to target advocacy at the county level. The toolkit offers suggestions for priorities related to the CalSAWS migration, system and business process changes, and decision making that will happen at the local level. Local advocates can use the toolkit to develop an advocacy strategy and identify their priorities.

Who should use this toolkit?

Community-Based Organizations that would like to engage their local county departments of social services, health and human services, public health, child welfare, and refugee services regarding the CalSAWS migration and implementation in their respective counties.

This includes advocates from legal aid services groups, public health and consumer advocates, and enroller/application assister advocates for Medi-Cal, CalFresh, CAPI, GA/GR, and Child Welfare.



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When are Counties Migrating to CalSAWS?

What is the SAWS?

“SAWS” stands for the Statewide Automated Welfare System. They are the computer systems that manage the application and recertification process for CalFresh, Medi-Cal, CalWORKs, CAPI, GA/GR and Child Welfare. There are currently three SAWS (information technology) systems being used by California counties to conduct benefits eligibility, determinations, and maintenance for people seeking social safety net supports: LRS (Los Angeles County), C-IV (39 counties), and CalWIN (18 counties). These systems are also called the “SAWS Consortia.” Multiple “ancillary” services, such as document imaging, online portals, and contact center software, connect with each county’s SAWS system as part of the overall technology for administering benefits programs.

The LRS system in Los Angeles is being enhanced so that it can meet the needs of all 58 counties. This enhanced system will be called the California Statewide Automated Welfare System, or CalSAWS.

Why are Counties Migrating?

Due to a federal mandate requiring California to move to a single eligibility system, the counties (through the CalSAWS Project) are currently working in partnership with the State and Federal government to expand and

enhance LRS to become CalSAWS. Then all C-IV and CalWIN counties will move to that system (CIV and CalWIN will no longer be in use). Counties will still administer the safety net programs, but will all use the same eligibility system (CalSAWS) to do so. California is required to have all counties moved into the new system by the end of 2023 (or risk loss of federal funding).

Why does it matter?

The three current SAWS and their ancillary systems are the technology at the center of eligibility determinations, business processes, and the overall experience for consumers and eligibility workers. How the technology is set up will have significant impacts on the experience of consumers and eligibility workers accessing social services. We want to make sure that consumer needs are prioritized in this process.

All C-IV Counties will migrate to the CalSAWS System in September 2021.

CalWIN Counties will migrate in six waves of a few counties at a time, starting in October 2022 until October 2023.

For more details and to look up when your county will be migrating, see the schedule in the **appendix**.

What role can I play?

As local advocates, you have an important role as the new CalSAWS system rolls out in your counties. You will have the chance to work with county decision makers to ensure that consumer perspectives are reflected when implementing new business processes and systems.

Now is a critical window of opportunity for you to prioritize consumer needs with your county. While some big decisions are being made at a statewide level, there are many decisions that individual counties still control. For example:

- Contact center menus/phone trees
- Implementation of online portal features, and
- Business process redesign.

Also, because some counties are using this opportunity to change how they do business, it is a good time to ask for improvements. Have you been wanting to see a “same day service” model implemented in your county? Would you like your county to make interview scheduling more flexible for consumers? These are the types of improvements you can encourage your county to prioritize.

The purpose of this tool kit is to help you identify your priorities for advocacy and create a successful meeting to begin or expand your partnership with your county in order to champion consumer needs in decision making during the CalSAWS transition.





The goal of this tool kit is to provide ideas and strategies for engaging with your county about the upcoming CalSAWS Migration (see the migration schedule in the **appendix**).

The migration includes moving all consumer data to the new eligibility system and implementation of multiple “ancillary systems” such as contact center software and a new online portal.

This will be no small feat, and you should be engaging with your county health and human services or social services departments to measure progress and encourage coordinated efforts across local departments and organizations.

Steps for Planning Your Advocacy

1. Think about other groups & organizations in your area that have consumers that will be impacted by this change (e.g., domestic violence groups, homeless services, IHSS, Foster Care and Former Foster Youth orgs). Remember that this new system will impact CalFresh, Medi-Cal, CalWORKs, CAPI, GA/GR and Child Welfare.

- a. Ask if they want to partner in requesting a meeting with your county.
- b. Use this toolkit to create a strategy together.

2. Review the webinars and materials to familiarize yourselves with the migration scope and terminology.

- a. Goodbye YBN, MyBCW, C4YS! Hello, CalSAWS! (6/30/2020)
 - i. [Webinar](#)
 - ii. [Slide deck](#)
- b. [CalSAWS Migration Toolkit Webinar](#)
- c. [Notes about the C-IV County OCM \(Organizational Change Management\) Plans](#) (and link to the OCM slide deck from the April 2020 PSC meeting).
- d. CalWIN County OCM: Deloitte has been selected as the vendor for the CalWIN County OCM ([RFP info \(shows the services being requested\) here](#)).
- e. See the **appendix** for additional research and recommendations.

An Important note about C-IV vs CalWIN vs LA Counties:

- Readiness plans for C-IV counties are currently underway. CIV counties have less to change/update because their current system is very similar to CalSAWS (which is being built on LRS).
- Readiness planning for CalWIN Counties will begin in January 2021. CalWIN Counties will have to make more significant changes and have a longer Organizational Change Management (OCM) Process to undergo.
- LA County will not have a readiness plan since they are not migrating. However, they will be implementing new things like the contact center and online portal, so advocates still have a role to play.





3. Identify your priorities. Remember that as an advocate or outreach provider, you are already an expert in understanding how your clients interact with your current SAWS system (LRS, CIV, CalWIN)! Think about what you already know about the consumer experience; and/or ask consumers for their feedback.

- a. What is the vision of a business process and system that can work for your consumers (eg, same day service, no churn, streamlined enrollment, immediate access to uploaded verifications)?
- b. What bottlenecks and barriers do you frequently encounter?
- c. What types of problems should the county be working to solve as part of the migration?
- d. Pick a few goals to push for using our list of recommended priorities (**see appendix**) or identify your own!

4. Plan a successful meeting

- a. Use the template agenda and the priorities you identify to prepare for the meeting.
- b. Go through the agenda with your advocate team and identify who will lead each topic.
- c. Be prepared to discuss your priority areas and explain why they are important.
- d. Identify the major takeaways that you think would make the meeting a success.

5. Reach out to your county’s health and human services or public social services departments to set up a meeting about the CalSAWS Migration.

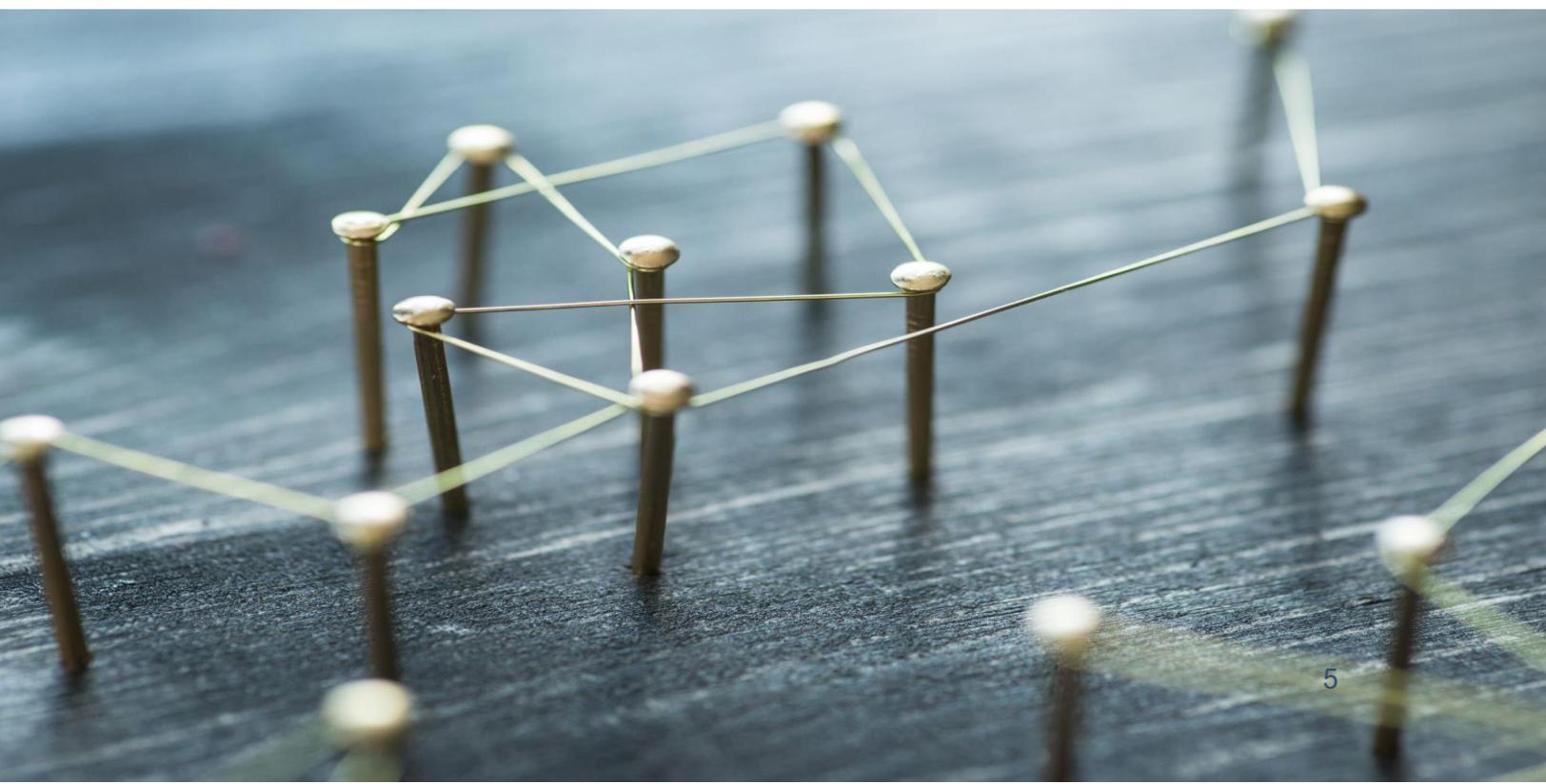
- a. Or request an existing meeting be dedicated to this topic. You can use the email template in the **appendix** to get you started.

6. Hold a successful meeting! Yay!

- a. Follow the plan you made with your advocate team.
- b. Be sure to identify next steps and who is assigned to lead them.
- c. Discuss who else should be invited to the next meeting (and who will make the invitation).
- d. After the meeting, send a follow up thank you and request for a next meeting.

7. Monitor progress and track strategies

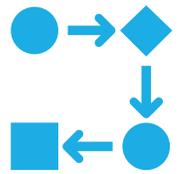
- a. Continue to meet regularly with your county (see below for agenda templates).
 - b. Continue to invite CBO partners and other representatives from county divisions to join the meetings.
 - c. Identify the timelines and milestones in your county's Readiness Plan; where do your priorities fit in?
 - i. Plan to track them and ask for updates.
 - ii. Continue working with your county to include your priorities wherever possible.
 - d. Include time to explore specific aspects of the Readiness plan and Business Process Changes (see below for deep dive topic ideas).
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CalSAWS Migration – Local Advocate Priorities Guide



Business Process Redesign

- Culture of Access
- First Contact Resolution/Single Day Service
- Interview Scheduling Flexibility
- Real Time Document Upload
- Goal to Reduce Churn



Lead with Equity

- Accurate translations for threshold Languages
- Prioritize accessibility for people with disabilities
- Use data to identify barriers for BIPOC
- Create regular and transparent feedback loops with consumers



Contact/Call Center Software

- Full integration of features
- Clear and easy-to-navigate Self Service Phone Tree (IVR menu)
- Hold message customizations and priorities
- Dedicated Line for Assisters



Support Collaboration

- Engage with CBOs to represent all programs (Medi-Cal, CalFresh, CalWORKS, CAPI, etc)
- Include CBOs and advocates in the OCM process with regular updates



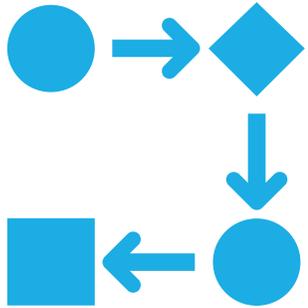
Online Application Portal

- Full integration of features (chat, email, text)
- Training for CBO Partners
- Continued engagement on portal usage and enhancements



Define Worker Readiness

- Know how worker training scores and other measures will define Readiness levels before migration



Business Process Redesign

CalSAWS Project Role: Providing a support team.

County Role: Internal decision-making process and part of the Organizational Change Management (OCM)

CBO/Advocate Role: Identify priorities and advocate to their local county for inclusion.

Timeline:

C-IV & LRS: Right now; opportunities more limited

CalWIN: January 2021; potentially more opportunities for change.

PRIORITIES

1. Culture of Access.
2. First Contact Resolution/Single Day Service.
3. Interview Scheduling Flexibility.
4. Real Time Document Upload.
5. Goal to Reduce Churn.



Contact/Call Center

CalSAWS Project Role: Managing the contract with Amazon Connect Services (ACS).

County Role: Decide on and implement the functionality they want to use.

CBO/Advocate Role: Identify priorities and advocate for their inclusion; track consumer experience.

Timeline: See the timeline link in the toolkit.

PRIORITIES

1. Full integration of features.
2. Clear and easy-to-navigate Self Service Phone Tree (IVR menu).
3. Hold message customizations and priorities.
4. Dedicated Line for Assisters.

Online Web Portal



PRIORITIES

1. Full integration of features (chat, email, text).
2. Training for CBO Partners.
3. Continued engagement on portal usage and enhancements.

CalSAWS Project Role: Contracting the development to Deloitte and ensuring it is ready for launch by Sept 2021.

County Role: Decide on and implement the functionality they want to use.

CBO/Advocate Role: Participate in UCD; advocate for implementation of features in your county.

Timeline:

Development: Now – August 2021

LRS & C-IV: Sept 2021

CalWIN: Oct 2022-2023



Lead with Equity

PRIORITIES

1. **Accurate translations for threshold Languages.**
2. **Prioritize accessibility for people with disabilities.**
3. **Use data to identify barriers for BIPOC.**
4. **Create regular and transparent feedback loops with consumers.**

CalSAWS Project Role: Currently developing an internal “D&I plan.”

County Role: Identify and prioritize opportunities to improve equitable access.

CBO/Advocate Role: Ask your county about their equity approaches.

Timeline: Ongoing.



Support Collaboration

PRIORITIES

1. Engage with CBOs to represent all programs (Medi-Cal, CalFresh, CalWORKS, CAPI, etc).
2. Include CBOs and advocates in the OCM process with regular updates.

CalSAWS Project Role: The vendors tasked with supporting Organizational Change Management (OCM) are supposed to include recommendations to engage/community with CBOs.

County Role: Include CBO partners in communications and planning for the CalSAWS Migration.

CBO/Advocate Role: Connect with your county for meetings and work with your partners to bring in more advocates from your county.

Timeline:

C-IV & LRS: Right now

CalWIN: Right now in anticipation of the January 2021 OCM launch

Define Worker Readiness



PRIORITIES

1. What percentage of staff must achieve a “certificate of completion” in order for the county to be ready for migration?
2. What other measures will be used to define worker readiness?

CalSAWS Project Role: Create the web-based training and testing for eligibility workers. 80% pass rate = “certificate of completion.”

County Role: Counties are creating their own plans to define if they are “ready” for the migration.

CBO/Advocate Role: Encourage your county to identify meaningful training goals.

Timeline:

C-IV and CalWIN: Trainings launch 4-8 weeks before migration.

CalSAWS Migration Schedule

All C-IV counties will join the Los Angeles (LRS) System, which is being enhanced to become CalSAWS, by Sept 2021. Further enhancements for CalWIN counties will be completed by October 2022. CalWIN Counties will migrate to CalSAWS in six “waves” over the course of 12 months.

C-IV Counties will join the CalSAWS system in a “single cut over.”	
All C-IV Counties	September 2021

New Online Portal Launch	
Los Angeles & C-IV Counties	September 2021
CalWIN Counties	In 6 waves per the schedule below

CalWIN Counties will migrate to CalSAWS in six waves.	
Placer & Yolo	October 2022
Santa Clara & Tulare	Feb 2023
Orange, Ventura & San Bernardino	April 2023
San Diego, San Mateo, Santa Cruz & Solano	June 2023
Alameda, Fresno, Contra Costa & Sonoma	August 2023
Sacramento, San Francisco & San Luis Obispo	October 2023

Contact Center Implementation Schedule

CalSAWS is creating a central contract with Amazon Connect Services to supply contact/call center software to all counties that choose to use it.

See below for counties that have already starting using this new software and counties that will be implementing in the future.

If you do not see you county listed, you may need to ask if they plan to do so in the future and if not, how will they meet the needs of consumers who need to access services via phone.

Counties that have already implemented the Amazon Connect contact/call center software:

Butte	Riverside (For Covered California Only)
Humboldt	San Bernardino
Kern	San Joaquin (For Covered California Only)
Kings	Shasta
Marin	Stanislaus
Merced (For Covered California Only)	Sutter
Monterey	Yuba

Counties that plan to implement Amazon Connect contact/call center software in the future (data TBD):

Alameda	San Diego	Solano
Contra Costa	San Francisco	Sonoma
Fresno	San Luis Obispo	Tulare
Los Angeles	San Mateo	Ventura
Orange	Santa Barbara	Yolo
Placer	Santa Clara	
Sacramento	Santa Cruz	

Meeting Request Email Template

See also this link for email template text:

<https://docs.google.com/document/d/1xgemGz3kGoxIsDR8jJ8yWmN8huNUeJ3ZEq1IPXtBGg/edit?usp=sharing>

To: *Your primary point of contact at your county HHS or DPSS and any others in leadership that your partner advocates may recommend.*

CC: *Any of your partner advocate organizations that you are working with to coordinate the meeting.*

Hello,

We are reaching out about the CalSAWS Migration. We understand that our county will be migrating to the new CalSAWS system in [month/year] [check migration date for your county in the **appendix**].

We'd like to know more about how [your county] is preparing for this change, and how we as advocates and community members can help support this change for our consumers.

Some of the topics we'd like to discuss include:

- Contact/Call Center technology implementation
- Online Portal Functionality and integration into business processes
- Change Management and Readiness Plans
- Business Process Re-engineering priorities

Could we [schedule a one hour meeting/add this to our existing meeting] to share our interest areas and learn more about the county's process?

Sincerely,

Your contact information and list any other organizations you are partnering with.

Template for one-hour stand-alone meeting

Before meeting with the county: connect with any other CBOs that you have invited and identify the priorities you want to advocate for. You may not have the exact same priorities but be on the same page about what is important to each of you.

Sample Agenda

1. Welcome and introductions (5 minutes)
2. Purpose for the meeting/context (5 minutes)
 - a. We are looking forward to the opportunities to support the changes in the upcoming CalSAWS Migration.
 - b. The Organizational Change Management (OCM) offers opportunities to make important changes to the business processes, culture, and other ways that access to services is impacted.
 - c. We'd like to share our priorities and hear about the county's priorities so that we can help to support a successful implementation.
3. Share priorities (15 minutes)
 - a. Our vision of what an accessible and equitable system looks like (eg, same day service, low churn, eligibility workers with the resources they need)
 - b. List the areas of focus and note the details of what you care about and why
 - c. You may want to use the Local Advocates Priorities Guide or create your own document to share and just review the high level areas before getting into the details
4. Feedback & discussion (30 minutes)
 - a. Invite your county to share their feedback and impressions.
 - b. Ask about the milestones and timelines from their Readiness Plan and how your priorities might be included.
 - c. If needed, return to your list of priorities and ask where they are included or how you can support getting them added.
5. Review next steps and ask for another meeting (5 minutes)

A draft agenda for future meetings could look like:

1. Welcome and Introductions
2. Follow up on Action Items from the previous meeting.
3. Status update on the Readiness Planning (timeline and milestones).
4. Discussion of a deep dive topic (pick one from the list).
5. Review next steps and schedule the next meeting

Deep Dive Topics

This list is a reference for further discussion of the priority topics. Equity Priorities are integrated in each topic where applicable.

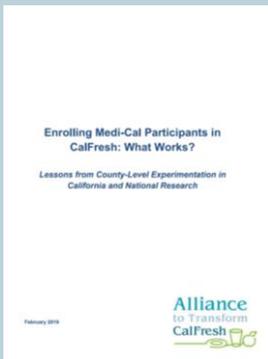
1. **Contact Center/Call Center Feature Integration** ([see list of counties that have already moved to Amazon Connect Services \(ACS\)](#))
 - a. Set up of Phone Trees/Menus
 - i. Have these been tested with consumers?
 - ii. Are they using data to identify the most used features/menus and move them up on the phone trees?
 - b. Prioritizing Language Access
 - c. Hold time messages
 - i. What messages will be included and can advocates provide recommendations?
 - ii. What languages will hold messages be translate into?
2. **Organizational Change Management/Readiness Plans/Business Process Redesign**
 - a. Vision for the future: Culture of Access, Same Day Service, Reducing Churn, flexible interview scheduling, etc.?
 - b. Readiness plans and Worker Training
 - i. How will the county be supporting eligibility workers and program staff to ensure they're ready for the transition to CalSAWS?
 - ii. Does the county plan to use the “certificate of achievement” attainment rates as a measure of readiness? What other measures might be used?
 - c. Equity Approaches
 - i. Language access
 - ii. Disability access
 - iii. LGBTQIA+ needs
 - iv. Anti-racism efforts and DEI plans?
3. **Online Application Portal Feature Integration**
 - a. Chat Features
 - b. Document Upload
 - c. Support/Help referrals
4. **Data Analysis**
 - a. Ask for data that can show how the priorities you identified are being addressed. For example, how many people are experiencing churn and where are they falling off? Where people are facing disparate outcomes based on race/ethnicity, language, or abilities?
5. **Post Migration Priorities**
 - a. What is the plan for communication and transparency after the cut over.
 - b. How will they assess how the new online portal is working?
 - c. What issues are coming up for eligibility workers, consumers, and assisters in the new CalSAWS System?
 - d. What is it like for people attempting to access services over the phone, and what is the county doing to make improvements?
 - e. Is there a feedback loop for local advocates and assisters to communicate about issues and concerns post-migration?

Additional Resources



Flexible Interview Models

<http://transformcalfresh.org/flexible-interview-scheduling-models-to-increase-calfresh/>



Dual Enrollment Best Practices

<http://transformcalfresh.org/dual-enrollment-what-works/>



Lost In Translation

<https://1drv.ms/b/s!AglrqNXMtHjrgcAtkoucIPMDYzhmpg?e=HBFRyD>