



DR. SHIRLEY N. WEBER
CALIFORNIA SECRETARY OF STATE



CAL-ACCESS REPLACEMENT SYSTEM PROJECT UPDATE

OCTOBER 05, 2022

10:30 – 11:00 AM



AGENDA



- Secretary Weber Welcome
- Introductions
- Project Update
- Communications Plan
- Wrap Up, Questions and Answers

INTRODUCTIONS

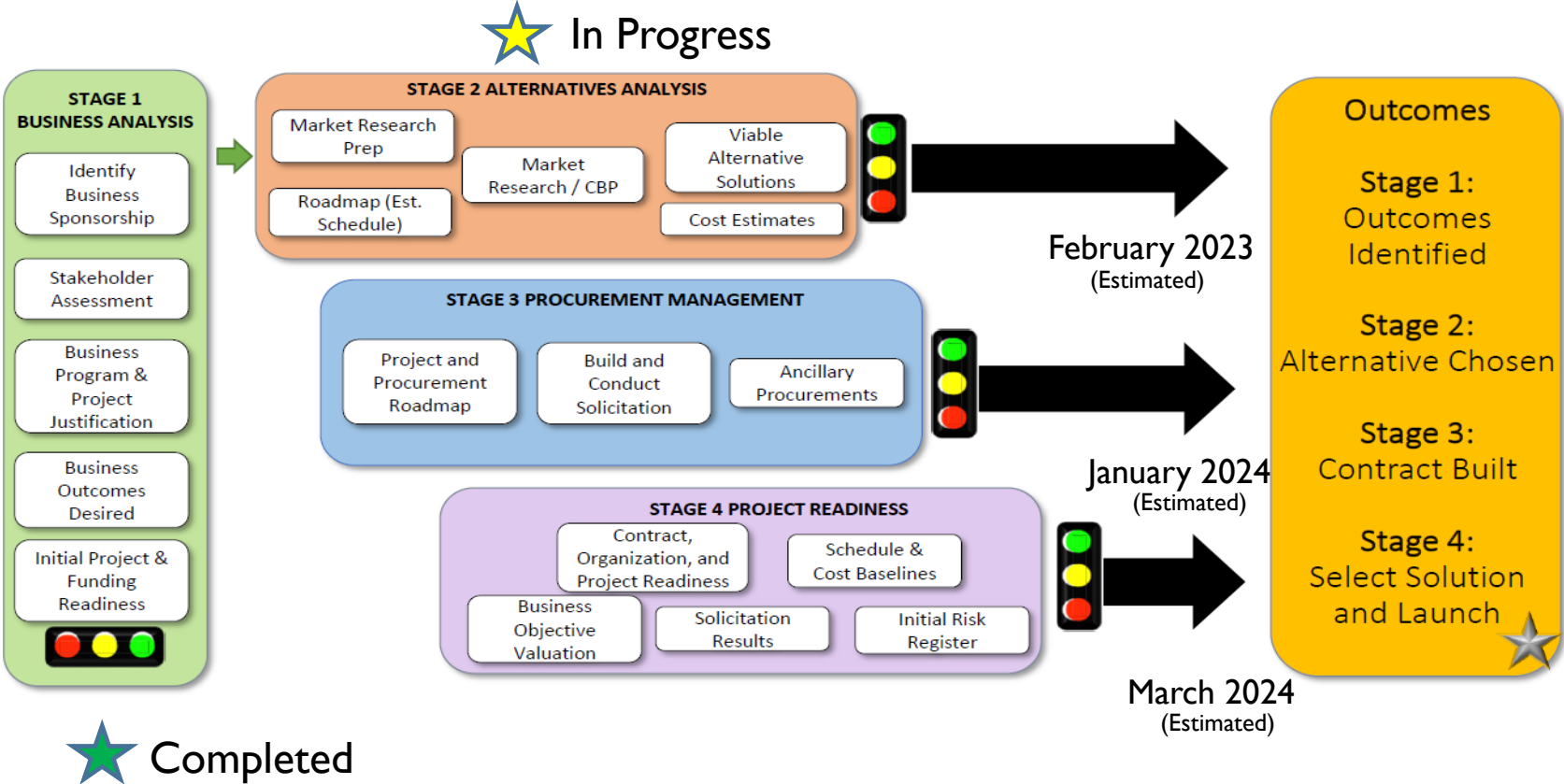


- Secretary Weber
- SOS Project Team
- Stakeholder Groups
- CDT Advisory and Oversight





WHERE WE ARE IN THE PROJECT APPROVAL LIFECYCLE PROCESS





CURRENT PROJECT ACTIVITIES – SOS STAFF

- Budget Change Proposal for FY 2023/2024
- Stage 2 Alternatives Analysis Activities
 - Market Research
 - Data Readiness Activities
 - Project Schedule and Budget
 - Communications Plan – very important to stakeholders
 - Monthly project updates to the stakeholder community
 - Form working groups based on input from stakeholders
- Recruiting state staff
- Request for Offer to hire contracted staff for project planning activities

PROCUREMENT



- Request for Offer (RFO) was released for planning contractor resources on August 12 and closed on September 23
- Review and evaluation of bids is underway
- Contractors are expected to be onboard by early November



CONTRACTOR ACTIVITIES



- Contractor resources will be acquired to:
 - Assist with market research
 - Develop the solicitation document to acquire a system integrator
 - Create the Business Process Plan
 - Assist with data readiness activities

PLANNED STAKEHOLDER ENGAGEMENT



- Scheduling monthly recurring meetings on the first Wednesday of each month with the first scheduled meeting on October 5th
- Will schedule working group meetings based on input from the October 5th meeting



3rd Party Software Vendor & Service Providers

SOS has approximately 23 vendors that have been certified by SOS to provide electronic filing services to the regulated community. Vendors are interested in project status; how they are involved and impacted; and, how they need to prepare. Vendors need to be provided ample time to make necessary changes to their filing system formats so they can continue to provide online filing services to their clients.



Good Government Groups Institute of Governmental Advocates

The Institute of Governmental Advocates (IGA) is a voluntary, non-partisan association representing the leading professional lobbyists and lobbying firms in California's Capitol. Their primary interest is in lobbying functionality.

These groups of stakeholders are committed to improving management at all levels of government. They are a mix of professional associations, advocacy groups, foundations, educational institutions, and non-profit organization that focus on specific topics such as transparency in government, truth in advertising, campaign finance reform, or lobbying reform.



Partner Agencies

Fair Political Practices Commission

Our partner agency who is responsible for the impartial and effective administration of the Political Reform Act. The Act regulates campaign financing, conflicts of interest, lobbying, and governmental ethics.

Franchise Tax Board

Our partner agency that performs non-tax audits of political entities

CREATE WORKING GROUPS



- Previous working groups – do they still apply?
 - Software Vendor Subgroup
 - Stakeholder Input Group (SIG)
 - Partner Agencies
- Contact Information Requested
 - What is the name of your organization?
 - Who will represent your group?
 - Which category do you feel your organization fits into?

SUMMARY



- SOS staff activities
 - Conducting market research
 - Doing data readiness activities
 - Developing the project schedule and budget
 - Submitting the Stage 2 Alternatives Analysis to CDT
 - Continuing staff recruiting efforts
 - Implementing stakeholder communications
 - RFO for contractor resources is in the review and evaluate process
- Contractor resources are expected to be onboard by early November



Questions and Answers

WHERE TO FIND PROJECT INFORMATION



Visit the CARS Project website

<https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/>

- View documents, news, and events
- Sign up to receive project updates

CARS Project Email Address: Submit questions and comments to the CARS project team:
PRDCARS@sos.ca.gov



**Campaign
Finance &
Lobbying
Activities**

Learn More



**CAL-ACCESS
Replacement System
Project (CARS) Updates**