CAL-ACCESS Replacement System Project

Project Kick-Off

July 24, 2018

Project Objectives

Gov. Code 84602(c) (SB1349)	Legacy System	New CAL-ACCESS	Potential Future Enhancements
Features: Data driven On-line payments Tracking Amendments Electronic Filing Visual display	No No No Some Limited	Yes Yes Yes All Robust	
Electronic Signature		√	
Unique Identifier	√ Major Donor	√ Major Donor	√ All
Local Filing			√

Project Current and Future

Current	Future
• Legacy CAL-ACCESS has unsupported, outdated technology	• New CAL-ACCESS will use latest cutting edge and cloud based technologies
• Campaign finance and lobbying activity process is paper based	• All electronic filing model
• PRD and stakeholder operations are hindered by technological limitations	• Modern, supportable architecture will allow PRD to adapt, change, and support the changing regulatory environment

Project Current and Future

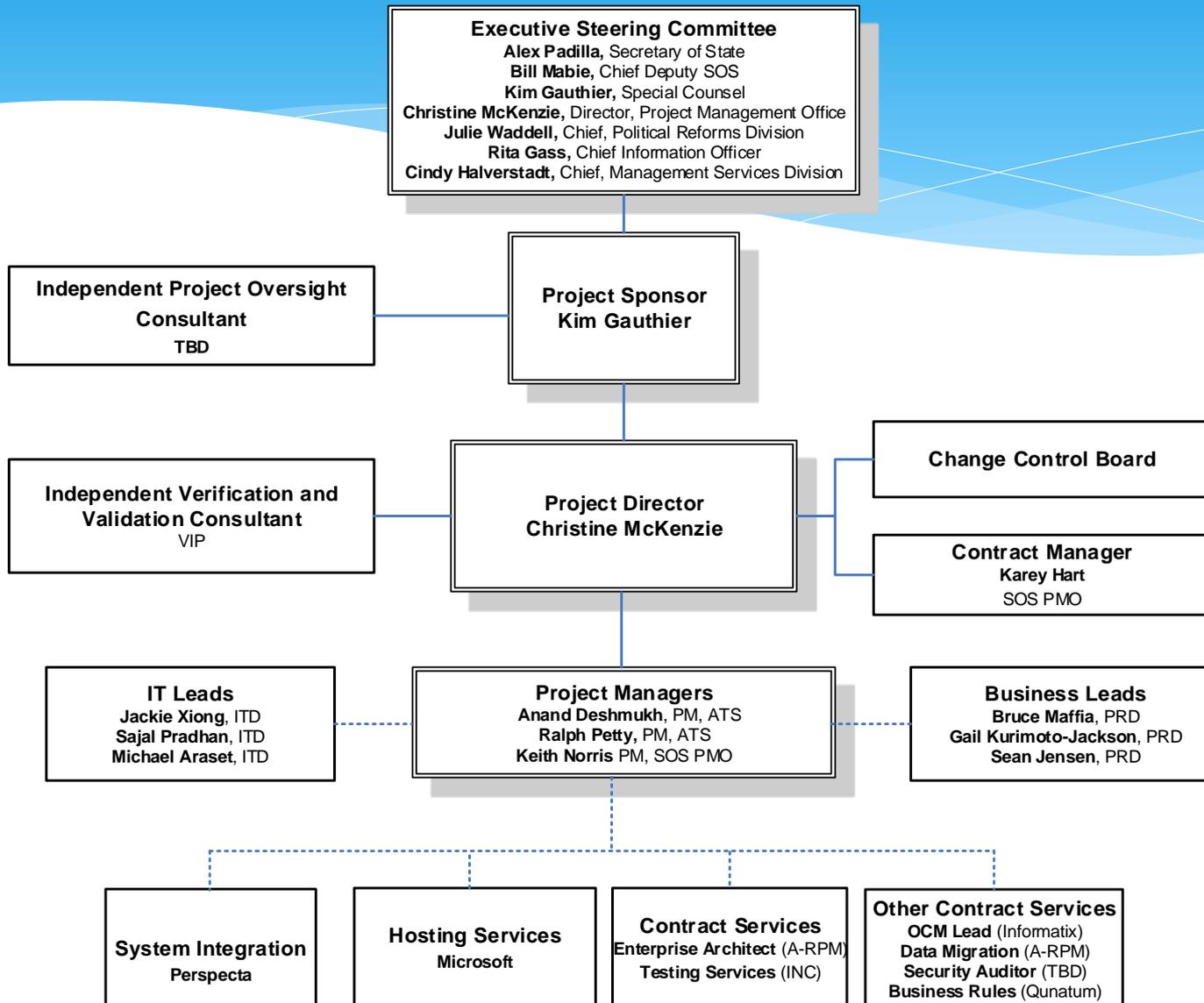| Current	Future
• Registration data is entered manually from filer-submitted paper forms	• Registration data will be entered electronically one time by the filer or the filer's representative
• The form-driven process	• Data driven solution
• Limited ability to query, aggregate and report data	• Data driven system with enhance ability to query, aggregate and report data

Project Team

Project Organization

Executive Steering Committee
Alex Padilla, Secretary of State
Bill Mabie, Chief Deputy SOS
Kim Gauthier, Special Counsel
Christine McKenzie, Director, Project Management Office
Julie Waddell, Chief, Political Reforms Division
Rita Gass, Chief Information Officer
Cindy Halverstadt, Chief, Management Services Division

Independent Project Oversight Consultant
TBD

Project Sponsor
Kim Gauthier

Independent Verification and Validation Consultant
VIP

Project Director
Christine McKenzie

Change Control Board

Contract Manager
Karey Hart
SOS PMO

IT Leads
Jackie Xiong, ITD
Sajal Pradhan, ITD
Michael Araset, ITD

Project Managers
Anand Deshmukh, PM, ATS
Ralph Petty, PM, ATS
Keith Norris PM, SOS PMO

Business Leads
Bruce Maffia, PRD
Gail Kurimoto-Jackson, PRD
Sean Jensen, PRD

System Integration
Perspecta

Hosting Services
Microsoft

Contract Services
Enterprise Architect (A-RPM)
Testing Services (INC)

Other Contract Services
OCM Lead (Informatix)
Data Migration (A-RPM)
Security Auditor (TBD)
Business Rules (Qunatum)

6

System Integration Team

System Integrator: Perspecta

* Civilian State and Local Group (CSL)

    * More than 50 years of experience in the public sector.

    * Partner with municipal, county and state government clients across the country.

    * Deliver services in more than 34 states.

Project Partner: PCC Technologies

    * Specialists providing services to 33 Secretary of State offices nationwide

    * Ethics and Compliance (Campaign Finance, Lobbyist Reporting, Statement of Financial Interest), Business Registration and Voter Registration

    * California Experience: LA County – successfully deployed Campaign Finance System

Current Activities

* **System Integrator Team** is on board and has begun project activities

* **Data Migration Team** is evaluating existing information, legacy data and planning approach for migration

* **Legislative Clean-up (SB 1239) -** Senator Hertzberg has introduced Senate Bill 1239 that includes Legislative Changes for the new system. The bill has passed in the Senate and the Assembly committee on Elections and Constitutional Amendments. It has now been referred to the Assembly Appropriations Committee and is on track

Current Activities

* **Project Planning and Initiation Team** - One of the key activities for the team at this time is to develop an integrated project schedule that details each activity, their dependencies, timing and sequencing.

* **Organizational Change Management Team** – is developing a Change Management Plan for our internal and external stakeholders

* **Functional Integration Team** – has begun working with the System Integrator team to develop our overall approach of robust functional and user acceptance testing.

Current Timeline

Area	Current Schedule for December 2019
Requirements and Design	July 2018 – October 2018
CARS Solution Development	September 2018 – June 2019
End-to-End Testing	October 2018 – July 2019
User Acceptance Testing	February 2019 – October 2019
New System and Business Process Training	June 2019 – November 2019
CARS Public Access Go Live	December 2019

Communication

Right Message + **Right Messenger** + **Right Audience** + **Right Time** = **Communication Strategy**

Channels and Tools

Website
- FAQs
- Announcements
- Project status and milestones

Email
- Announcements throughout the project
- Project status as milestones are met
- ConstantContact delivery to the subscribers

Reports
- Project Status'
- Weekly, bi-weekly, monthly and on-demand based on audience
- Email and presentation

Surveys, Public Meetings, Workshops
- Project Status
- As needed
- By Invitation to select stakeholders

Branding and Logo
- Promotes recognition and familiarity
- Consistent across all communication

Thank You

Questions? Contact: prdcars@sos.ca.gov