

Mr. Joe Stephenshaw
Director, Department of Finance
915 L Street
Sacramento, CA 95814

September 30, 2024

Director Stephenshaw,

On behalf of the **California County Information Technology Authority** (CCAITA), I am pleased to submit the attached **Year 2 Report** for the **County Assessors' Information Technology Grant Program**.

CCAITA continues to make substantial progress on the objectives and goals as outlined in the initial application to provide technology solutions for all Californians as described in the legislative intent authorizing and appropriating this program.

Earlier this year, CCAITA successfully completed a Proof of Value (POV) for the IT platform on the two projects: Proposition 19 & Exemptions. The State funds continue to be critical for delivering the envisioned State IT system and resulting benefits to property owners and Assessors throughout the State. This Year 2 Report documents our progress, top projects, developments, and all expenditure the CCAITA has made.

We would also like to note that CCAITA's bylaws contain provisions requiring a periodic independent audit to ensure public transparency and accountability of all funds. CCAITA has retained an auditing firm, and the first audit is underway. CCAITA will make the auditor's findings available as soon as it is completed.

The allocation of the final amount approved in the State's 2024-2025 budget will support an IT system that is dependable and secure, providing public services through these common technology solutions and benefit the citizens of California through efficient and cost-effective shared systems that are user friendly across counties.

We would like to thank you and your team for the professionalism and support DOF has shown the CCAITA these past two years.

Respectfully,



Don H. Gaekle, Stanislaus County Assessor

Board Chair, CCAITA

Cc: Chris Hill, Department of Finance

County Assessors' Information Technology Grant Program

California County Assessors' Information Technology
Authority (CCAITA)

Year 2 Report
October 1, 2023 – September 30, 2024

September 30, 2024

Introduction

The *California County Assessors Information Technology Authority (CCAITA)* continues to implement the vision associated with delivering a statewide information technology solution available to all California County Assessors for digital filings and information sharing between counties, specifically related to Proposition 19 and Exemption filings.

The CCAITA was created in November 2022 as a joint powers authority (JPA) after the 2022-2023 Budget Act established the *County Assessors Information Technology Grant Program* and allocated \$30 million across a three-year span. That same year, the first allocation of \$10 million for the first year was provided to assist County Assessors in performing property assessments with technology investments.

The Governor and the California State Legislature have recognized that when county assessors are able to evaluate property for tax purposes efficiently, accurately, and equitably, it benefits both property owners and state and local governments. By supporting County Assessors with funds to create technological resources, the result will be to streamline the property assessment process, providing digital access leading to efficiency and better government to property owners across the state.

On November 3, 2020, California voters approved Proposition 19, and its implementing statutes CA Revenue and Taxation Code sections 63.2 and 69.6 were enacted September 30, 2021. The passage of Proposition 19 created new requirements for filing documents, certifying values across Counties, and reporting to the State.

A technological solution is necessary for County Assessors across California to implement Proposition 19 exemptions and enable easy access for taxpayers to obtain and file the required forms. This solution allows for County Assessor staff to communicate with one another about the information needed to process an application between Counties.

The 2024-2025 Budget Act provided the third round of funding to the County Assessors Information Technology Grant Program administered by the Department of Finance. Over the past year, CCAITA has made measurable movement in developing a reliable and modern solution. The following report delineates the progress CCAITA has made from October 2023 to September 2024.

CCAITA Members & Governance

As of September 30, 2024, thirty-three (33) counties are members of the CCAITA [\(Attachment A\)](#). In accordance with state guidelines, counties must be approved by the respective County Board of Supervisors to join the CCAITA.

The members of the CCAITA formed various committees, including those focused on drafting bylaws and creating the organizational governance structure. Through this process the bylaws were drafted and voted upon by the members and a governing structure was established in

accordance with the bylaws. The Board of Directors is made up of (9) Directors, who must be Assessors, and are as follows: CAA President, CAA Treasurer, Coordinating Assessor, two representatives of small counties, two representatives of medium counties, and two representatives of large counties.

The current board consists of:

Don H. Gaekle, Chair - (Large County Member), Assessor Stanislaus County
Phong La, Coordinating Assessor & Secretary, Assessor Alameda County
Tara K. Freitas, Treasurer (CAA Treasurer), Assessor/Clerk/Recorder Tulare County
Christina Wynn, (CAA President), Assessor Sacramento County
Kristen De Paul, (Small County Member), Assessor/Recorder Modoc County
Steve Bestolarides, (Large County Member), Assessor/Recorder/Clerk San Joaquin County
Shelly Scott, (Medium County Member), Assessor/Recorder/Clerk Marin County
John Tuteur, (Medium County Member), Assessor/Clerk/Recorder/Registrar Napa County
Kaenan Whitman, (Small County Member), Assessor/Recorder Tuolumne County

CCAITA Year 2 Actions

IT Architecture Consultant

As noted in the Year 1 Report, CCAITA is utilizing a County Leveraged Procurement Vehicle with Gartner as an IT architecture consultant, along with independent system validation for design, developing the system design based off the Prop 19 Project Charter approved by the CCAITA Board and providing a roadmap for the Project Manager to implement.

Contract with Gartner for the below consulting services was executed on October 2, 2023, with all deliverables completed by Spring 2024, at a total cost of \$562,000.

Additionally, as the date of the Year 2 Report the CCAITA is in the process of finalizing a new contract with Gartner to for an independent analysis of the Proof of Value solution, development of a comprehensive, fair and competitive RFP solicitation for an enterprise technology solution, along with the development of a strong evaluation framework and process to ensure maximum clarity for vendor participation and ultimately competition for the largest financial commitment and purpose of the Authority: the enterprise IT solution.

Executive Director

As noted in the Year 1 Report, in the summer of 2023 the CCAITA determined a contractor to serve as Executive Director would benefit Authority by removing the day-to-day operations from the Assessors and to streamline the CCAITA operations. The CCAITA hired an interim Executive Director to coordinate committees, project scope, actions needed to implement, and assist with procurement efforts.

In October 2023, the CCAITA released an RFP for a permanent Executive Director to assist the organization through this multi-year creation of a technological solution and received submissions from two entities. However, the costs in all the proposals were significantly more than the cost of

the Interim Executive Director and neither had the subject matter expertise of the Interim: experience and knowledge of the Assessor function and the property tax system, as well as, experience with public procurement rules and processes associated. After consideration from the Ad Hoc Committee and the CCAITA Board Members, the CCAITA cancelled the RFP in November 2023. The CCAITA Board voted to enter into a contract agreement for an Executive Director in January 2024.

Project Managers

As noted in the Year 1 Report, in September 2023, the Interim Executive Director published a Request for Offer (RFO) through a California Department of General Services' (DGS) established leveraged procurement contract vehicle for a Project Manager to develop and implement the identified technological solutions and system designed by the IT Architecture Consultant.

Following the RFO, the CCAITA Board determined it would be beneficial to contract with two separate Project Managers: one for the Proposition 19 portal, and one for the exemption's portal. The CCAITA contracted with TEKsystems, for "Information Technology Staffing and Special Project Services" for the Project Managers (PMs).

The Project Managers began working for CCAITA in December 2023 for both the Property 19 and Exemption's portals. One of the first deliverables for the PMs was to assist CCAITA with creating an RFP (Request for Proposal) publicly posted for a Proof of Value (POV) – the creation of a "model" IT solution to be crafted and tested prior to contracting for a full enterprise solution. In addition to being involved in the deliberation and choosing of a System Integrator. The PMs had the additional roles of:

- Project planning and coordination including project plans, scope documents, and resource allocation schedules.
- Resource management and staffing and resource utilization reports.
- Risk assessment and management, including budget allocation for identifying project risks, assessing their impact, and developing mitigation and contingency plans.
- Progress monitoring and reporting:
- Quality assurance and control, including allocations for implementing quality assurance processes to ensure project deliverables meet the standards as issued in the RFP.

Model IT System – Proof of Value

As noted in the Year 1 Report, CCAITA had a courageous and promising vision to complete a Proof of Value with a System Integrator to create a modern and reliable solution for the Property 19 and Exemptions Portals. On October 20, 2024 the CCAITA released their Request for Proposal for that Proof of Value.

The CCAITA received responses from two System Integrators – *Modern iConcepts* and *Just Appraised*. The Project Managers, alongside the ad-hoc committees and Executive Director worked diligently to review the submissions. The CCAITA Board selected *Just Appraised* for both portals – Proposition 19 and Exemptions.

The Proof of Value included five major milestones/deliverables, all of which have been completed and are currently pending formal review and approval of documentation artifacts before final payment to vendor is made.

Independent Information Technology Consultant

In June 2024, CCAITA executed a contract for an independent consultant to help manage the various IT contractors. Working under the guidance of the Executive Director, the IT Consultant will provide services aimed at advancing the CCAITA’s information technology initiatives. The Consultant's focus will be on enhancing the CCAITA’s strategic execution capabilities. By leveraging their expertise and experience, they will work to optimize the execution framework, promote collaboration, and drive measurable outcomes that align with the CCAITA’s strategic goals.

CCAITA Reporting Requirements

Reporting for the time period of: 10/1/2023 to 09/30/2024 (Year 2)	
<p>For a full accounting of program funds expended by the authority please see Attachment B.</p> <p>Anticipated expenditure of Program Funds from October 2024 – September 2025:</p>	
Table 2: FY 2024-2025 Anticipated Allocation of Program Funds	
Category	Estimated Budget
Project Management & Administrative Services	\$1,200,000
System Designer/Analyst	\$900,000
System Development/Creation	\$8,000,000
System Implementation & Licenses	\$2,000,000
Maintenance & Operations	\$500,000
Total Budget:	\$12,600,000
<p><i>A description of the purposes for which program funds were expended in the preceding fiscal year, and the associated deliverables received by the authority or the participating counties.</i></p> <p>The expenditures are directly related to building the processes and systems for implementation of the County Assessors Information Technology program. The Expenditures and associated deliverables are designed for effective project management and the creation and deployment of the information technology system.</p>	

The 10/01/2023 to 09/30/2024 expenditures within the anticipated and approved 5% allotment to administration including: counsel for the authority, Executive Director to oversee the projects, insurance for the JPA, and the accounting and financial reporting needed.

Information Technology Expenditures include:

- IT architecture Consultant
- Project Managers
- Proof of Value system development vendor

A description of how the deliverables are in furtherance of the goals specified in the authority's program application.

The CCAITA has embarked on an initiative to support California's 58 county assessors with modernized and enhanced technology solutions and tools to meet the challenges of the complex property tax administration. These challenges necessitate cross-county cooperation to administer the annual assessment rolls and associated tracking and reporting requirements accurately and efficiently.

The CCAITA's primary objective is to provide technological solutions to foster efficient interactions between property owners, local assessors and meet the reporting requirements of other governmental departments.

Property owners often sell and/or buy property and relocate across county boundaries. Proposition 19 and other modifications to changes in property tax administration necessitates multiple exchanges of information between county assessors.

In furtherance of the goals specified in the program application the CCAITA IT system will:

- A. Automate and streamline the Prop 19 certification process among county assessors by providing a centralized Prop 19 Portal Case Management solution that allows: 1) property owners to file applications and required documentation seamlessly, and 2) transmit those applications and required certifications between county assessors.
- B. Provide a platform for county assessors and county auditors to meet the CDTFAs Proposition 19 reporting requirements, including cross-county Prop 19 claims, reports on positive or negative gain for each county, and audit county response times as required by the Prop 19 reporting structure.
- C. Maintain and publish an Audit Trail of data exchanges, results, and processing time between counties. Generate analytical dashboard and reports.
- D. Create Portal Case Management workflows that can be scaled to include increased functionality such as automated data exchange, online forms, and API exposure to existing county assessor property tax systems.

The issuance of the RFP for the Enterprise IT System and ultimate contract with a vendor for the development and deployment is estimated to cost \$10,000,000+ and is described in the initial application.

A description of whether the authority is meeting the timeline specified in its application.

CCAITA is meeting the anticipated timeline. Please see the attached Project Manager Dashboards for details regarding breakdown of timelines, milestones, and deliverables:

PROPOSITION 19 PORTAL - [Attachment C](#)

EXEMPTIONS PORTAL - [Attachment D](#)

Any corrections or changes to the information reported in the preceding annual reports, if any, and the reasons for those corrections or changes.

N/A

Attachment A

California County Assessors' Information Technology Authority
Membership Roster - As of September 2024
County
Alameda
Calaveras
El Dorado
Humboldt
Kern
Kings
Los Angeles
Madera
Marin
Mariposa
Merced
Modoc
Mono
Monterey
Napa
Nevada
Placer
Riverside
Sacramento
San Bernardino
San Francisco
San Joaquin
San Luis Obispo
Shasta
Siskiyou
Solano
Sonoma
Stanislaus
Tulare
Tuolumne
Ventura
Yolo
Yuba

Attachment B

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY BOARD

TREASURER'S REPORT
To the CAAITA Board
For the CAAITA Meeting
August 6, 2024

1. The 2nd Quarter (May-July) 2024 Financial Statements were completed.
 - i. We had interest earnings in the 2nd quarter of \$2.37 through Wells Fargo and \$167,619.78 through Tulare County.
 - ii. Cash disbursements for the 2nd quarter were \$1,413,805.27
 1. \$54,000.00 for Executive Director & Admin
 2. \$3,285.50 for Attorney Fees
 3. \$0 for Accounting Fees
 4. \$456,700 for Project Managers
 5. \$880,000.00 for System Designer
 6. \$16,799.65 for Insurance
 7. \$2,995.12 Office/General Admin Expenses
 8. \$25 Bank Fee
 - iii. Bank balances for July 31, 2024, were as follows:
 1. Wells Fargo: \$368,376.73
 2. Tulare County Treasury: \$18,612,700.89

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY BOARD

TREASURER'S REPORT To the CAAITA Board For the CAAITA Meeting April 25, 2024

1. The 1st Quarter (Jan-Apr) 2024 Financial Statements were completed.
 - i. We had interest earnings in the 1st quarter of \$4.60 through Wells Fargo and \$158,637.58 Tulare County.
 - ii. Cash disbursements for the 1st quarter were \$209,845.
 1. \$0 for Admin, Pinnacle Advocacy
 2. \$4,371.50 for Attorney Fees
 3. \$207.50 for Accounting Fees
 4. \$205,266 for Project Managers
 - iii. Bank balances for April 25, 2024, were as follows:
 1. Wells Fargo: \$231,420.27
 2. Tulare County Treasury: \$19,950,154.92

CALIFORNIA COUNTY ASSESORS' INFORMATION TECHNOLOGY AUTHORITY

Financial Statements
Jan 2024 - April 2024

Prepared by
admin@ccaitjpa.org

Prepared on
April 17, 2024

Table of Contents

Income Statement as of 4/17/2024.....3

Balance Sheet as of 4/17/2024.....4

2024 Cash Disbursements.....5

2024 Cash Receipts.....6

Accounts Payable Aging Summary Report.....7

Income Statement as of 4/17/2024

November 21, 2022 - April 17, 2024

	Total
INCOME	
Contributed income	25.00
Services	20,000,000.00
Total Income	20,000,025.00
EXPENSES	
Contract & professional fees	
Accounting fees	2,107.50
Admin (5%)	54,286.99
Legal fees	18,516.00
Project Manager	205,266.00
Total Contract & professional fees	280,176.49
Insurance	17,525.40
Office/General Administrative Expenses	125.37
Total Expenses	297,827.26
NET OPERATING INCOME	19,702,197.74
OTHER INCOME	
Interest Earned	479,377.45
Total Other Income	479,377.45
NET OTHER INCOME	479,377.45
NET INCOME	\$20,181,575.19

Balance Sheet as of 4/17/2024

As of April 17, 2024

		Total
	As of Apr 17, 2024	As of Dec 31, 2023 (PY)
ASSETS		
Current Assets		
Bank Accounts		
State/Local Government Checking (6214) - 1	231,420.27	189,514.05
Tulare County Treasury	19,950,154.92	20,043,263.34
Total Bank Accounts	20,181,575.19	20,232,777.39
Total Current Assets	20,181,575.19	20,232,777.39
TOTAL ASSETS	\$20,181,575.19	\$20,232,777.39
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
Beginning Fund Balance	20,232,777.39	
Net After Interest Earned - Expenses Paid	-51,202.20	
Total Equity	20,181,575.19	
TOTAL LIABILITIES AND EQUITY	\$20,181,575.19	

*Payments made from the Tulare County Treasurer's Account before the Wells Fargo account opening in August 2023 are awaiting verification.

2024 Cash Disbursements

January - April 17, 2024

	Total
Best Best & Krieger LLP	4,371.50
Bill.com	-0.62
Gunning & Gunning CPA	207.50
TEKsystems Inc.	205,266.00
TOTAL	\$209,844.38

2024 Cash Receipts

Jan 1 - Apr 17 2024

ACCOUNT	DATE	TRANSACTION TYPE	CUSTOMER FULL NAME	MEMO/DESCRIPTION	CLEARED	AMOUNT
State/Local Government Checking (6214) - 1						
State/Local Government Checking (6214) - 1	01/31/2024	Deposit	Wells Fargo	INTEREST EARNED	Cleared	\$1.57
State/Local Government Checking (6214) - 1	02/29/2024	Deposit	Wells Fargo	INTEREST EARNED	Cleared	\$1.86
State/Local Government Checking (6214) - 1	03/31/2024	Deposit	Wells Fargo	INTEREST EARNED	Cleared	\$1.17
Total for State/Local Government Checking (6214) - 1						\$4.60
Tulare County Treasury						
Tulare County Treasury	04/17/2024	Deposit	--	--	Uncleared	\$158,637.58
Total for Tulare County Treasury						\$158,637.58

Accounts Payable Aging Summary Report

Vendor	Current	1 to 30	31 to 60	61 to 90	91+	Total
Best Best & Krieger LLP	\$ 2,603.00	\$ 1,428.50	\$ -	\$ -	\$ -	\$ 4,031.50
TEKsystems Inc.	\$ 135,508.00	\$ 92,504.00	\$ -	\$ -	\$ -	\$ 228,012.00
Gartner *						\$ 562,000.00
Just Appraised**						\$ 1,400,000.00
Pinnacle Advocacy LLC ***		\$ 55,919.27				\$ 55,919.27
Grand Total	\$ 138,111.00	\$149,851.77	\$ -	\$ -	\$ -	\$ 2,249,962.77

*Our contract with Gartner entails obligations totaling \$562,000

*Our contract with Just Appraised entails obligations totaling \$1.4 million.

**This amount includes reimbursement for website hosting services, including expenses for GoDaddy, Wix, and Zoom.

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

FINANCIAL STATEMENTS

As of
December 31, 2023

	Page
Budget Analysis	2
Income Statement	3
Balance Sheet	4
Cash Receipts	5
Cash Disbursements	6

Prepared by
Tara Freitas, Treasurer

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

BUDGET ANALYSIS December 31, 2023

	2022 Actual	2023 Adopted Budget	2023 Actual
Revenue			
Interest	\$ 2,203	\$ 20,000	\$ 317,358
CA ITA Grant	\$ 10,000,000	\$ -	\$ 10,000,000
Total Revenue	\$ 10,002,203	\$ 20,000	\$ 10,317,358
Expenses			
Project Manager	\$ -	\$ 500,000	\$ -
System Designer	\$ -	\$ 1,500,000	\$ -
IT System Builder	\$ -	\$ 7,000,000	\$ -
Admin (5%)	\$ -	\$ 500,000	\$ 54,413
Maintenance	\$ -	\$ 452,000	\$ -
Professional Services	\$ -	\$ 48,000	\$ 32,370
Total Expenses	\$ -	\$ 10,000,000	\$ 86,783
NET INCOME (LOSS)			
	\$ 10,002,203	\$ (9,980,000)	\$ 10,230,575

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

INCOME STATEMENT December 31, 2023

Revenue

CA IT Grant	\$ 10,000,000	
Interest	\$ 317,358	
Misc	\$ -	
	<hr/>	
Total Revenue		\$ 10,317,358

Expenses

Expenses

Project Expenses:

Project Manager	\$ -	
System Designer	\$ -	
IT System Builder	\$ -	
	<hr/>	
Total Project Expenses	\$ -	

Professional Services

Insurance	\$ 17,525	
Attorney	\$ 12,945	
CPA	\$ 1,900	
	<hr/>	
Total Professional Services	\$ 32,370	

Admin (5%)	\$ 54,413	
Maintenance	\$ -	
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Total Expenses		\$ 86,783
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NET INCOME (LOSS)		\$ 10,230,575
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CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

Balance Sheet December 31, 2023

	2022	2023
Assets		
Cash	\$ 10,002,203	\$ 20,231,057
Total Assets	\$ 10,002,203	\$ 20,231,057
Liabilities		
Accounts Payable	\$ 4,810	
Total Liabilities	\$ 4,810	\$ -
Fund Balance		
Restricted	\$ 9,997,393	\$ 20,231,057
Total Fund Balance	\$ 9,997,393	\$ 20,231,057
Total Liabilities, and Fund Balance	\$ 10,002,203	\$ 20,231,057

CALIFORNIA COUNTY ASSESSORS' INFORMATION

TECHNOLOGY AUTHORITY

2023 CASH RECEIPTS

DATE	RECEIVED FROM	CA IT GRANT	INTEREST	MISC
3/31/2023	TC Trust Fund Interest	\$	57,424.26	
6/30/2023	TC Trust Fund Interest	\$	68,381.20	
8/31/2023	Wells Fargo Interest	\$	4.79	
9/30/2023	TC Trust Fund Interest	\$	72,233.45	
9/30/2023	Wells Fargo Interest	\$	20.57	
10/31/2023	Wells Fargo Interest	\$	18.45	
11/10/2023	Assessor IT Grant: Round 2	\$ 10,000,000.00		
11/30/2023	Wells Fargo Interest	\$	1.60	
12/31/2024	Wells Fargo Interest	\$	1.62	
12/31/2024	TC Trust Fund Interest	\$	119,271.57	
		\$ 10,000,000.00	\$ 317,357.51	\$ -
Total Receipts		<u>\$ 10,317,358</u>		

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

2023 CASH DISBURSEMENTS

DATE	PAID TO	PROJECT MANAGER	SYSTEM DESIGNER	IT SYSTEM BUILDER	MAINTENANCE	INSURANCE	Attorney	CPA	ADMIN (5%)
6/8/2023	Best Best & Krieger LLP						\$ 4,810.00		
6/8/2023	Flanigan_ Leavitt Insurance					\$ 17,525.40			
6/13/2023	Best Best & Krieger LLP						\$ 3,027.50		
8/11/2023	Gunning & Gunning							\$ 1,900.00	
9/1/2023	Best Best & Krieger LLP						\$ 162.00		
9/5/2023	WF Check Order								\$ 125.99
9/14/2023	Alcorn Law Corporation						\$ 1,200.00		
9/14/2023	Best Best & Krieger LLP						\$ (742.00)		
9/21/2023	Best Best & Krieger LLP						\$ 3,737.00		
10/10/2023	Best Best & Krieger LLP						\$ 455.00		
10/30/2023	Pinnacle Advocacy								\$ 54,286.99
11/7/2023	Best Best & Krieger LLP						\$ 520.00		
12/7/2023	Best Best & Krieger LLP						\$ 975.00		
12/31/2023	Alcorn Law Corporation- Adjustment ¹						\$ (1,200.00)		
		\$ -	\$ -	\$ -	\$ -	\$ 17,525.40	\$ 12,944.50	\$ 1,900.00	\$ 54,412.98
	Total Disbursements								
		\$ 86,782.88							

Notes:

- Expected Adjustment. Should have been paid through CAA.

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

FINANCIAL STATEMENTS

As of
November 27, 2023

	Page
Budget Analysis	2
Income Statement	3
Balance Sheet	4
Cash Receipts	5
Cash Disbursements	6

Prepared by
Tara Freitas, Treasurer

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

BUDGET ANALYSIS November 27, 2023

	2022 Actual	2023 Adopted Budget	2023 Actual
Revenue			
Interest	\$ 2,203	\$ 20,000	\$ 198,083
CA ITA Grant	\$ 10,000,000	\$ -	\$ 10,000,000
Total Revenue	\$ 10,002,203	\$ 20,000	\$ 10,198,083
Expenses			
Project Manager	\$ -	\$ 500,000	\$ -
System Designer	\$ -	\$ 1,500,000	\$ -
IT System Builder	\$ -	\$ 7,000,000	\$ -
Admin (5%)	\$ -	\$ 500,000	\$ 54,413
Maintenance	\$ -	\$ 452,000	\$ -
Professional Services	\$ -	\$ 48,000	\$ 32,595
Total Expenses	\$ -	\$ 10,000,000	\$ 87,008
NET INCOME (LOSS)			
	\$ 10,002,203	\$ (9,980,000)	\$ 10,111,075

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

INCOME STATEMENT November 27, 2023

Revenue

CA IT Grant	\$ 10,000,000	
Interest	\$ 198,083	
Misc	\$ -	
	<hr/>	
Total Revenue		\$ 10,198,083

Expenses

Expenses

Project Expenses:

Project Manager	\$ -	
System Designer	\$ -	
IT System Builder	\$ -	
	<hr/>	
Total Project Expenses	\$ -	

Professional Services

Insurance	\$ 17,525	
Attorney	\$ 13,170	
CPA	\$ 1,900	
	<hr/>	
Total Professional Services	\$ 32,595	

Admin (5%)	\$ 54,413	
Maintenance	\$ -	
	<hr/>	

Total Expenses		\$ 87,008
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NET INCOME (LOSS)		\$ 10,111,075
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CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

Balance Sheet November 27, 2023

	2022	2023
Assets		
Cash	\$ 10,002,203	\$ 20,113,278
Total Assets	\$ 10,002,203	\$ 20,113,278
Liabilities		
Accounts Payable	\$ 4,810	
Total Liabilities	\$ 4,810	\$ -
Fund Balance		
Restricted	\$ 9,997,393	\$ 20,113,278
Total Fund Balance	\$ 9,997,393	\$ 20,113,278
Total Liabilities, and Fund Balance	\$ 10,002,203	\$ 20,113,278

CALIFORNIA COUNTY ASSESSORS' INFORMATION TEC AUTHORITY

2023 CASH RECEIPTS

DATE	RECEIVED FROM	CA IT GRANT	INTEREST	MISC
3/31/2023	TC Trust Fund Interest	\$	57,424.26	
6/30/2023	TC Trust Fund Interest	\$	68,381.20	
8/31/2023	Wells Fargo Interest	\$	4.79	
9/30/2023	TC Trust Fund Interest	\$	72,233.45	
9/30/2023	Wells Fargo Interest	\$	20.57	
10/31/2023	Wells Fargo Interest	\$	18.45	
11/10/2023	Assessor IT Grant: Round 2	\$ 10,000,000.00		
		\$ 10,000,000.00	\$ 198,082.72	\$ -
Total Receipts		<u>\$ 10,198,083</u>		

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

2023 CASH DISBURSEMENTS

DATE	PAID TO	PROJECT MANAGER	SYSTEM DESIGNER	IT SYSTEM BUILDER	MAINTENANCE	INSURANCE	Attorney	CPA	ADMIN (5%)
6/8/2023	Best Best & Krieger LLP						\$ 4,810.00		
6/8/2023	Flanigan_ Leavitt Insurance					\$ 17,525.40			
6/13/2023	Best Best & Krieger LLP						\$ 3,027.50		
8/11/2023	Gunning & Gunning							\$ 1,900.00	
9/1/2023	Best Best & Krieger LLP						\$ 162.00		
9/5/2023	WF Check Order								\$ 125.99
9/14/2023	Alcorn Law corporation						\$ 1,200.00		
9/14/2023	Best Best & Krieger LLP- refund						\$ (742.00)		
9/21/2023	Best Best & Krieger LLP						\$ 3,737.00		
10/10/2023	Best Best & Krieger LLP						\$ 455.00		
10/30/2023	Pinnacle Advocacy								\$ 54,286.99
11/7/2023	Best Best & Krieger LLP						\$ 520.00		
\$ - \$ - \$ - \$ - \$ 17,525.40 \$ 13,169.50 \$ 1,900.00 \$ 54,412.98									

Total Disbursements
\$ 87,007.88

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

FINANCIAL STATEMENTS

As of
August 30, 2023

	Page
Budget Analysis	2
Income Statement	3
Balance Sheet	4
Cash Receipts	5
Cash Disbursements	6

Prepared by
Tara Freitas, Treasurer

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

BUDGET ANALYSIS August 30, 2023

	2022 Actual	2023 Adopted Budget	2023 Actual
Revenue			
Interest	\$ 2,203	\$ 20,000	\$ 125,810
CA ITA Grant	\$ 10,000,000	\$ -	
Total Revenue	\$ 10,002,203	\$ 20,000	\$ 125,810
Expenses			
Project Manager	\$ -	\$ 500,000	\$ -
System Designer	\$ -	\$ 1,500,000	\$ -
IT System Builder	\$ -	\$ 7,000,000	\$ -
Admin (5%)	\$ -	\$ 500,000	\$ -
Maintenance	\$ -	\$ 452,000	\$ -
Professional Services		\$ 48,000	\$ 27,883
Total Expenses	\$ -	\$ 10,000,000	\$ 27,883
NET INCOME (LOSS)			
	\$ 10,002,203	\$ (9,980,000)	\$ 97,927

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

INCOME STATEMENT August 30, 2023

Revenue

CA IT Grant	\$	-	
Interest	\$	125,810	
Misc	\$	-	
		<hr/>	
Total Revenue			\$ 125,810

Expenses

Expenses

Project Expenses:

Project Manager	\$	-	
System Designer	\$	-	
IT System Builder	\$	-	
		<hr/>	
Total Project Expenses	\$	-	

Professional Services

Insurance	\$	17,525	
Attorney	\$	8,458	
CPA	\$	1,900	
		<hr/>	
Total Professional Services	\$	27,883	

Admin (5%)	\$	-	
Maintenance	\$	-	
		<hr/>	

Total Expenses			\$ 27,883
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NET INCOME (LOSS)			\$ 97,927
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CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

Balance Sheet August 30, 2023

	2022	2023
Assets		
Cash	\$ 10,002,203	\$ 10,101,204
Total Assets	\$ 10,002,203	\$ 10,101,204
Liabilities		
Accounts Payable	\$ 4,810	
Total Liabilities	\$ 4,810	\$ -
Fund Balance		
Restricted	\$ 9,997,393	\$ 10,101,204
Total Fund Balance	\$ 9,997,393	\$ 10,101,204
Total Liabilities, and Fund Balance	\$ 10,002,203	\$ 10,101,204

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

2023 CASH RECEIPTS

DATE	RECEIVED FROM	CA IT GRANT	INTEREST	MISC
3/31/2023	TC Trust Fund Interest		\$ 57,424.26	
6/30/2023	TC Trust Fund Interest		\$ 68,381.20	
8/31/2023	Wells Fargo Interest		\$ 4.79	
Total Receipts				
		-	\$ 125,810.25	\$ -
		\$ 125,810		

CALIFORNIA COUNTY ASSESSORS' INFORMATION TECHNOLOGY AUTHORITY

2023 CASH DISBURSEMENTS

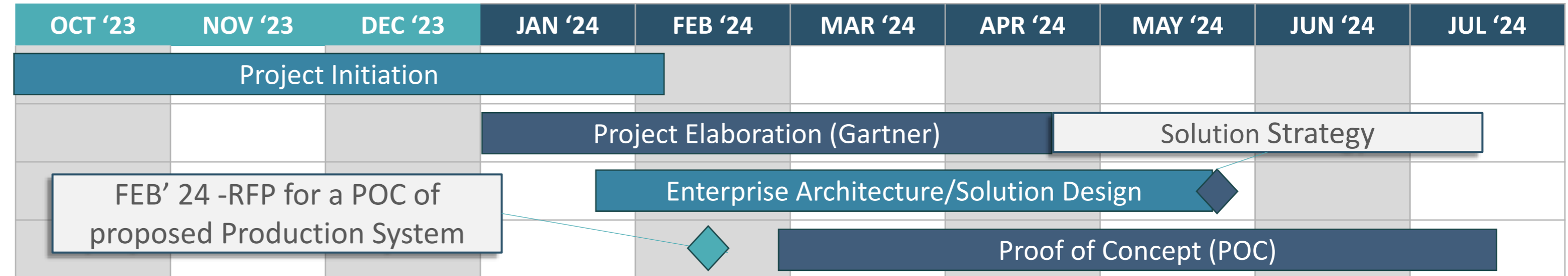
DATE	PAID TO	PROJECT MANAGER	SYSTEM DESIGNER	IT SYSTEM BUILDER	MAINTENANCE	INSURANCE	Attorney	CPA	ADMIN (5%)
6/8/2023	Best Best & Krieger LLP						\$ 4,810.00		
6/8/2023	Flanigan_Leavitt Insurance					\$ 17,525.40			
6/13/2023	Best Best & Krieger LLP						\$ 3,027.50		
8/11/2023	Gunning & Gunning							\$ 1,900.00	
9/1/2023	Best Best & Krieger LLP						\$ 162.00		
9/14/2023	Alcorn Law corporation						\$ 1,200.00		
9/14/2023	Best Best & Krieger LLP- refund						\$ (742.00)		

\$	-	\$	-	\$	-	\$	-	\$	-
\$	-	\$	-	\$	-	\$	17,525.40	\$	8,457.50
\$	-	\$	-	\$	-	\$	1,900.00	\$	-

Total Disbursements \$ 27,882.90

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	09/27/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



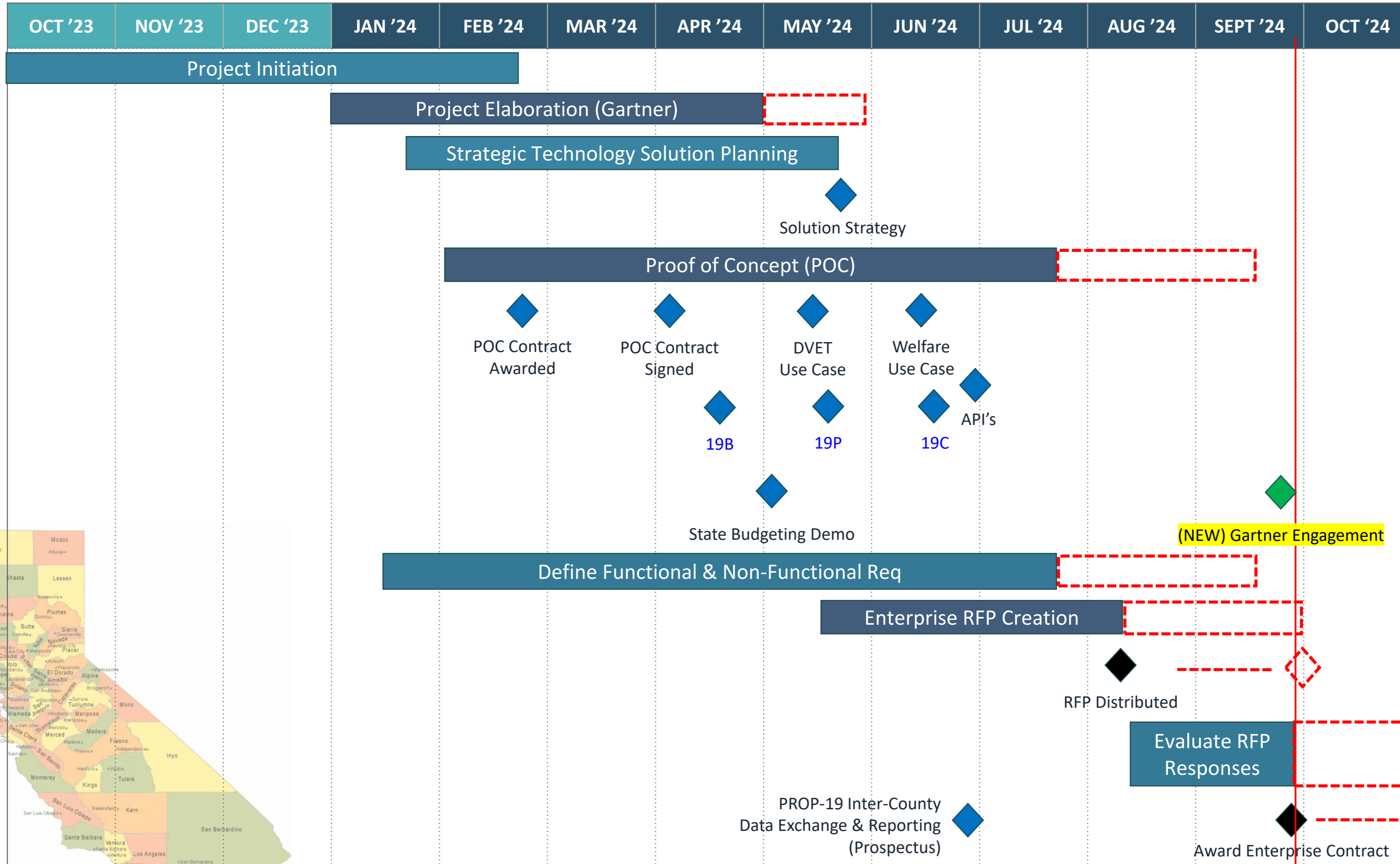
Schedule	Complete		
Scope	Complete		
Risk	None.		
Trend	S#6	S#7	S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The Project/Sprint is complete, per the approved Scope, Schedule and Budget specifications.
- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 09/27/24):	Upcoming Activities:
<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Delayed / Ongoing: Generation/Creation Phong’s sales video via compilation of Project Demo’s and Showcases. <i>(Reviewed source files, documented usable frames/scenes, meeting with Israel & Matt to get estimates to complete their reviews, and need for additional input from Phong for Theme, Transitions, and “Next-Steps”– Reset-Target for 1st cut on THU 09.26.24 TUE 10/01/24) *Power/Internet Outages due to Hurricane Helene caused the delay.</i></p> <p>Completed: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted. <i>No Meeting This Week.</i></p> <p>Completed: Project Closing Activities: Formally Submitted Payment Request Artifacts to CCAITA JPA Stakeholders’ Review/Approval.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Delayed / Ongoing: Generation/Creation Phong’s commercial video via compilation of Project Demo’s and Showcases. <i>(Deliver Rough Cut #1 on THU 09.26.24 TUE 10/01/24).</i></p> <p><i>Will need additional input from Phong: Theme, Transitions, and “Next-Steps”– Reset-Target for 1st cut on TUE 10/01/24).</i></p> <p>Ongoing: Enterprise County Engagement/Preparation: Work with JPA Leadership (Rob & Kan), and Gartner to formalize and outline the “next-steps” relative to start the agnostic work with each County Assessor (as deemed necessary/prioritized).</p>

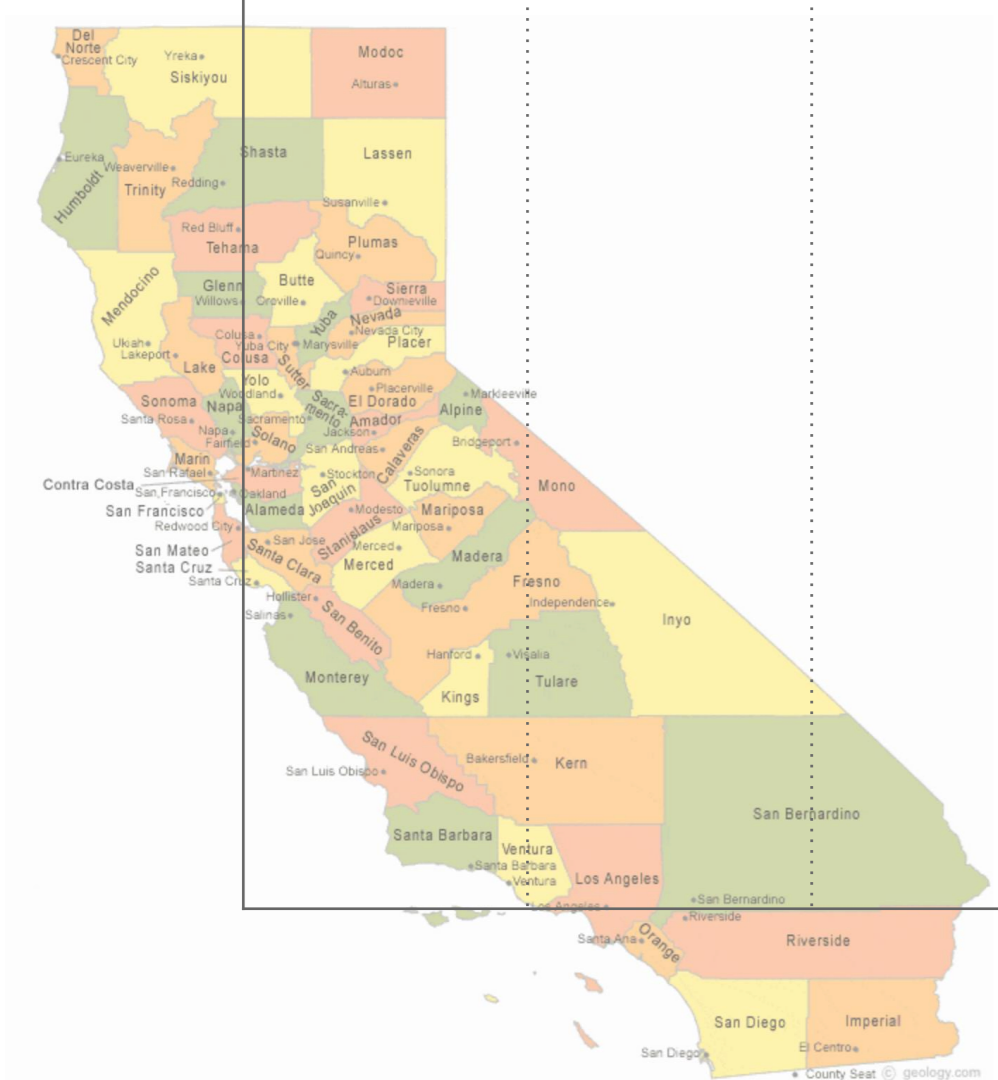
High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

□ Likely Delay



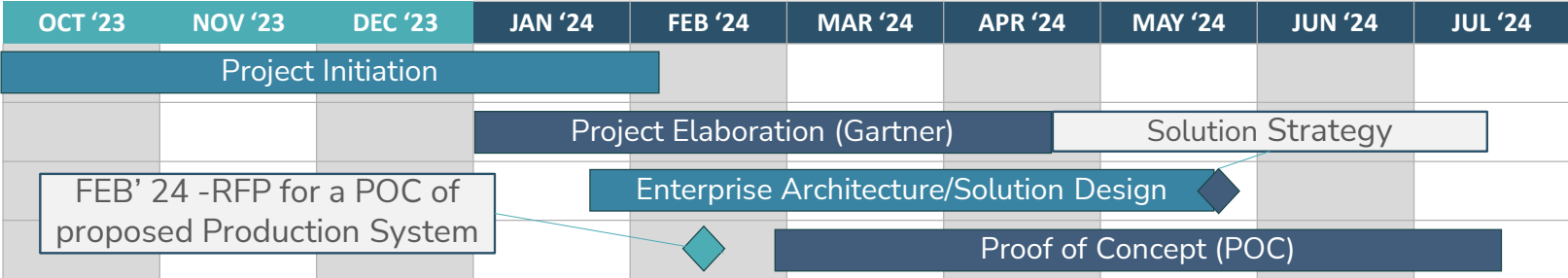
PROP-19 Inter-County Data Exchange & Reporting (Prospectus)

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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	09/20/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



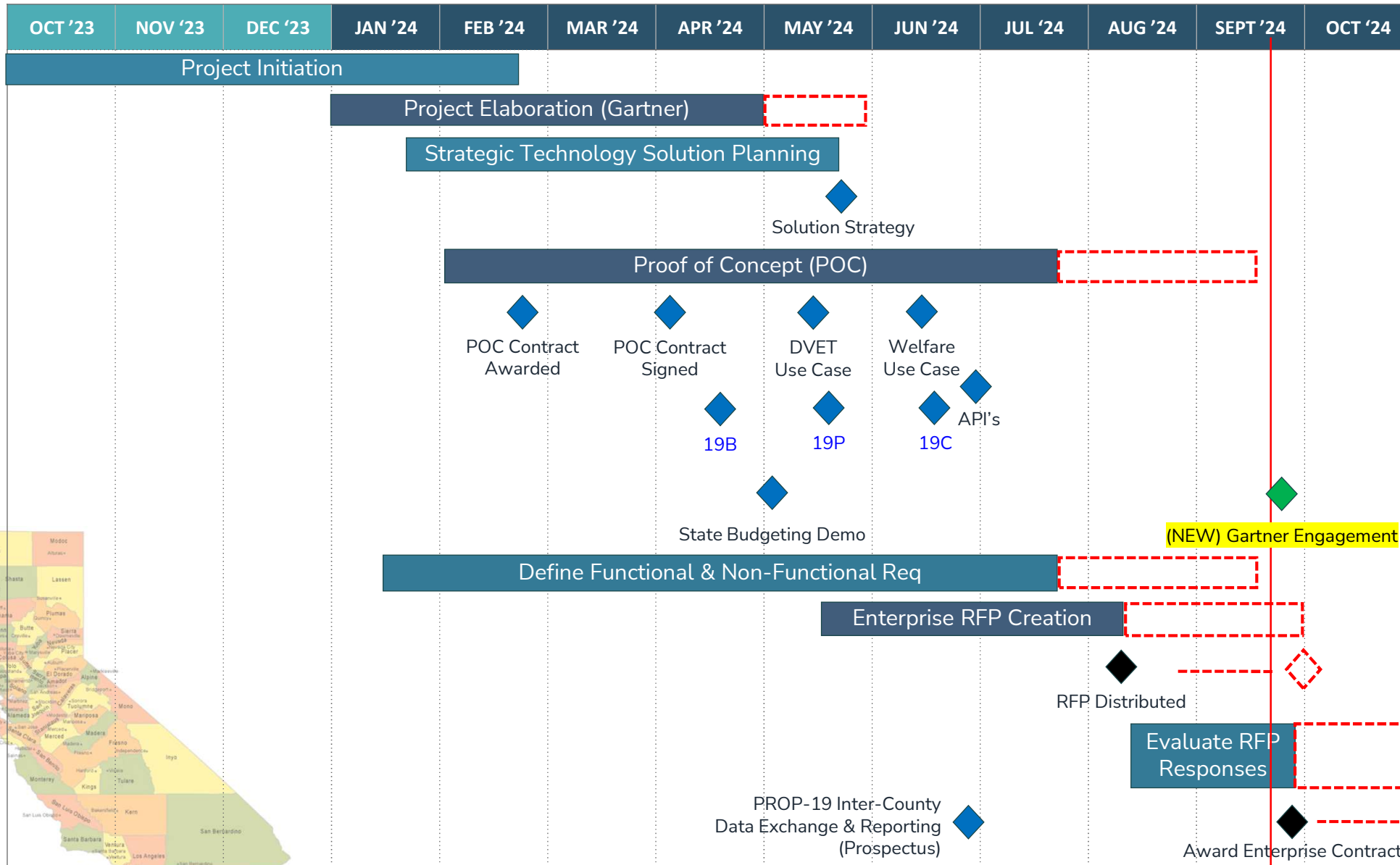
Schedule	Complete
Scope	Complete
Risk	None.
Trend	S#6 S#7 S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

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- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 09/20/24):	Upcoming Activities:
<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Ongoing: Generation/Creation Phong’s sales video via compilation of Project Demo’s and Showcases. <i>(Reviewed source files, documented usable frames/scenes, will review for Theme, Transitions, and “Next-Steps” on MON 09.23.24 – On-Target for 1st cut on THU 09.26.24)</i></p> <p>Completed: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted. <i>No Meeting This Week.</i></p> <p>Completed: Project Closing Activities: Formally Submitted Payment Request Artifacts to CCAITA JPA Stakeholders’ Review/Approval.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Ongoing: Generation/Creation Phong’s commercial video via compilation of Project Demo’s and Showcases. <i>(Deliver Rough Cut #1 on THU 09.26.24)</i></p> <p>Ongoing: Enterprise County Engagement/Preparation: Work with JPA Leadership (Rob & Kan), and Gartner to formalize and outline the “next-steps” relative to start the agnostic work with each County Assessor (as deemed necessary/prioritized).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

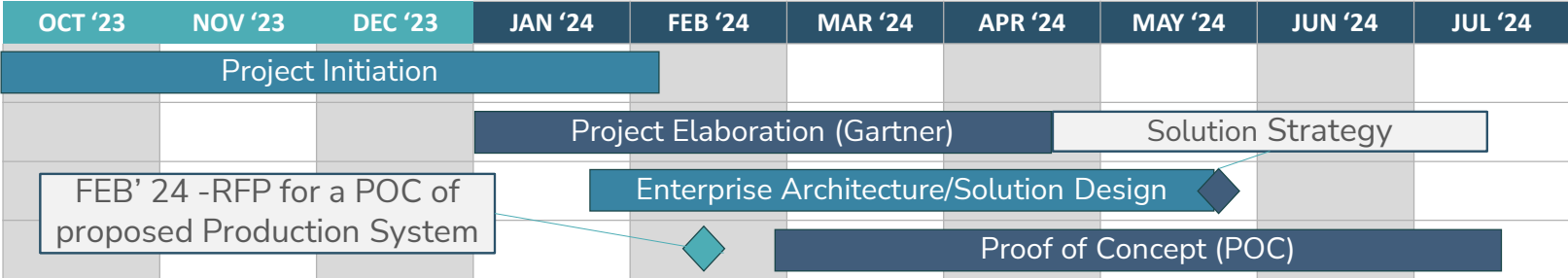
TIME NOW

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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	09/13/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



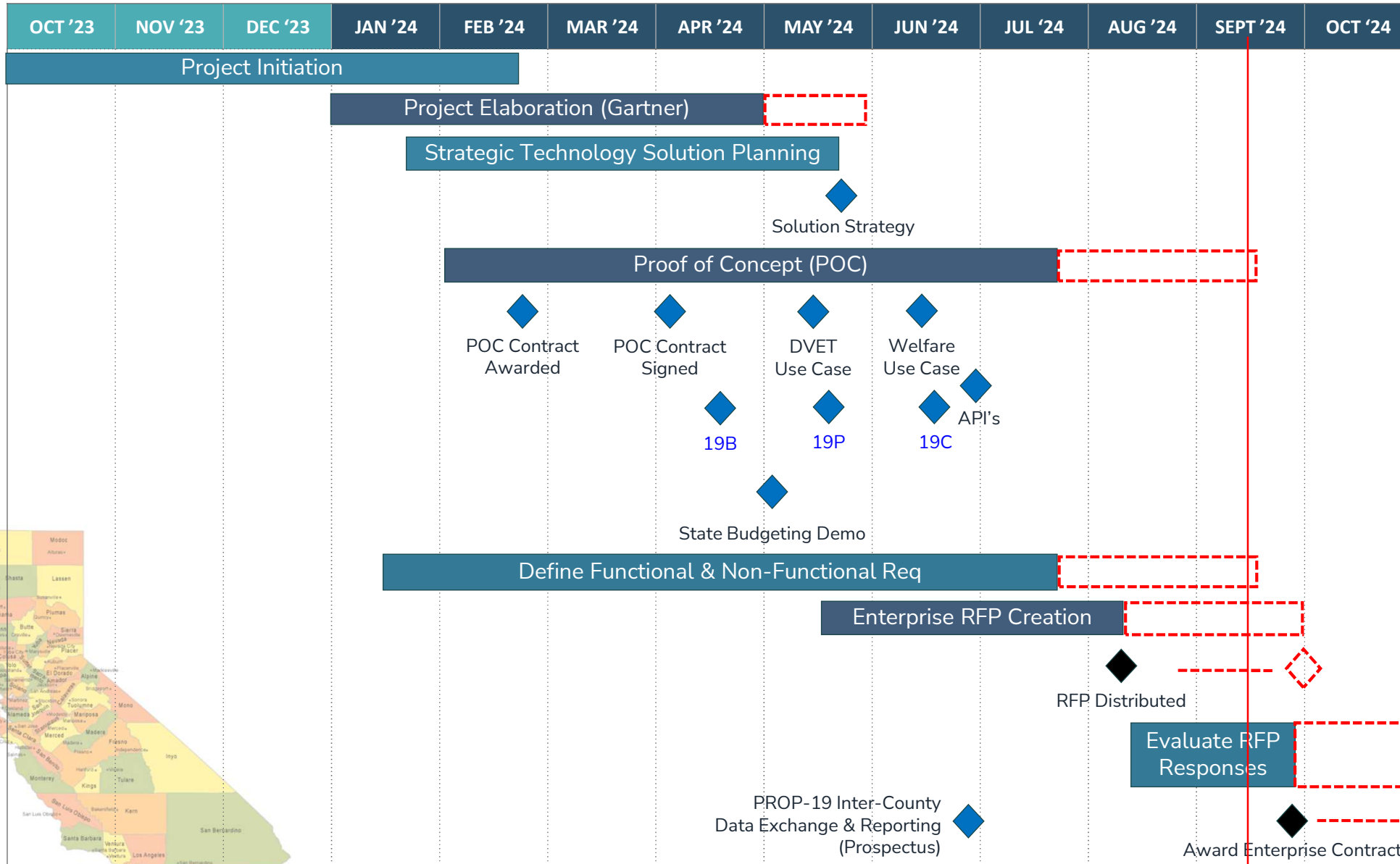
Schedule	Complete		
Scope	Complete		
Risk	None.		
Trend	S#6	S#7	S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The Project/Sprint is complete, per the approved Scope, Schedule and Budget specifications.
- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 09/13/24):	Upcoming Activities:
<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Ongoing: Generation/Creation Phong’s sales video via compilation of Project Demo’s and Showcases. <i>(Received zip file of all the .mp4/.mov video files for our use in creating the video on THU 09/12/24, and the files are under review for clip-selection/organization.)</i></p> <p>Completed: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p> <p>Completed: Project Closing Activities: Payment Request Forms, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Ongoing: Generation/Creation Phong’s commercial video via compilation of Project Demo’s and Showcases. <i>(Received zip file of all the .mp4/.mov video files for our use in creating the video on THU 09/12/24, and the files are under review for clip-selection/organization.)</i></p> <p>Ongoing: Enterprise County Engagement/Preparation: Work with JPA Leadership (Rob & Kan), and Gartner to formalize and outline the “next-steps” relative to start the agnostic work with each County Assessor (as deemed necessary/prioritized).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

□ Likely Delay

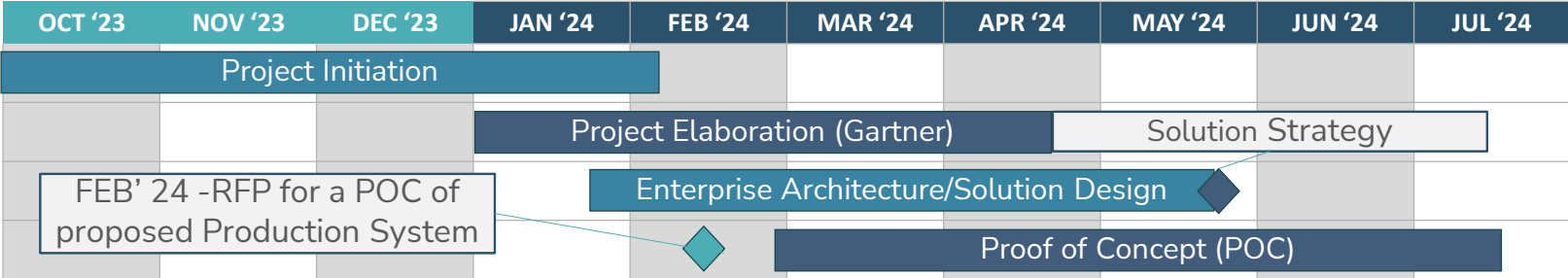
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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	09/06/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



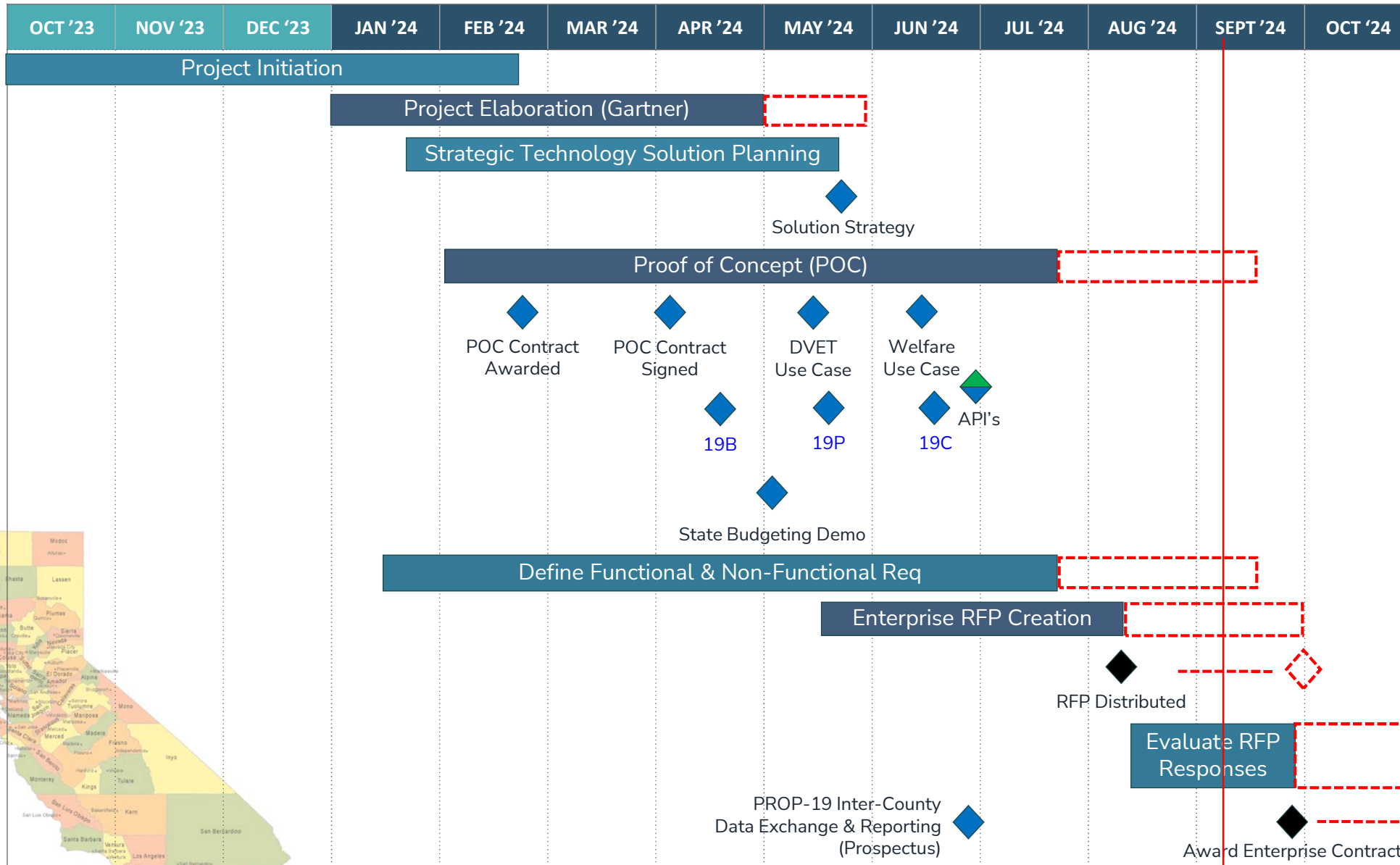
Schedule	Complete
Scope	Complete
Risk	None.
Trend	S#6 S#7 S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The Project/Sprint is complete, per the approved Scope, Schedule and Budget specifications.
- The project is on track per the approved Scope, Schedule and Budget specifications.
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- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 09/06/24):	Upcoming Activities:
<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Ongoing: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>Pending: Create Phong’s sales video via compilation of Project Demo’s and Showcases. (JA will send a zip file of all the .mp4/.mov video files for our use in creating the video NLT WED 09/11/24 and the rough cut due for review within two 2 weeks of receipt of the source files.)</p>
<p>Complete: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p> <p>As Needed: Demo creation Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>	<p>Complete: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing.</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay



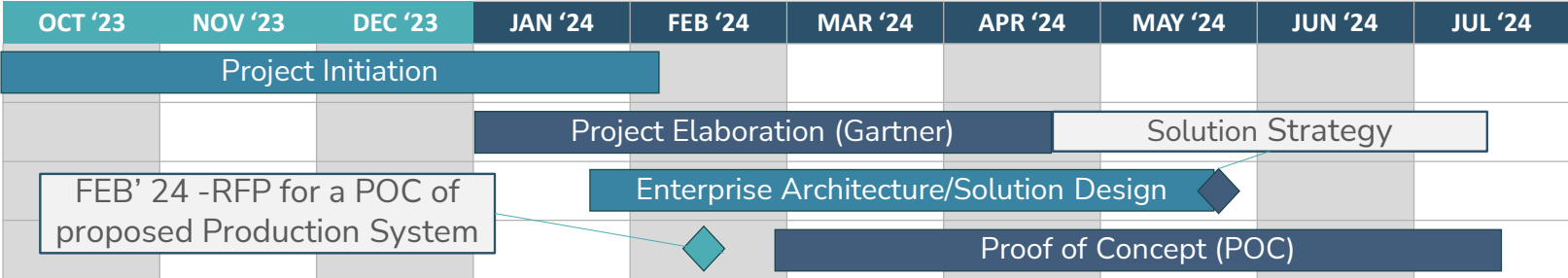
PROP-19 Inter-County Data Exchange & Reporting (Prospectus)

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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	08/30/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



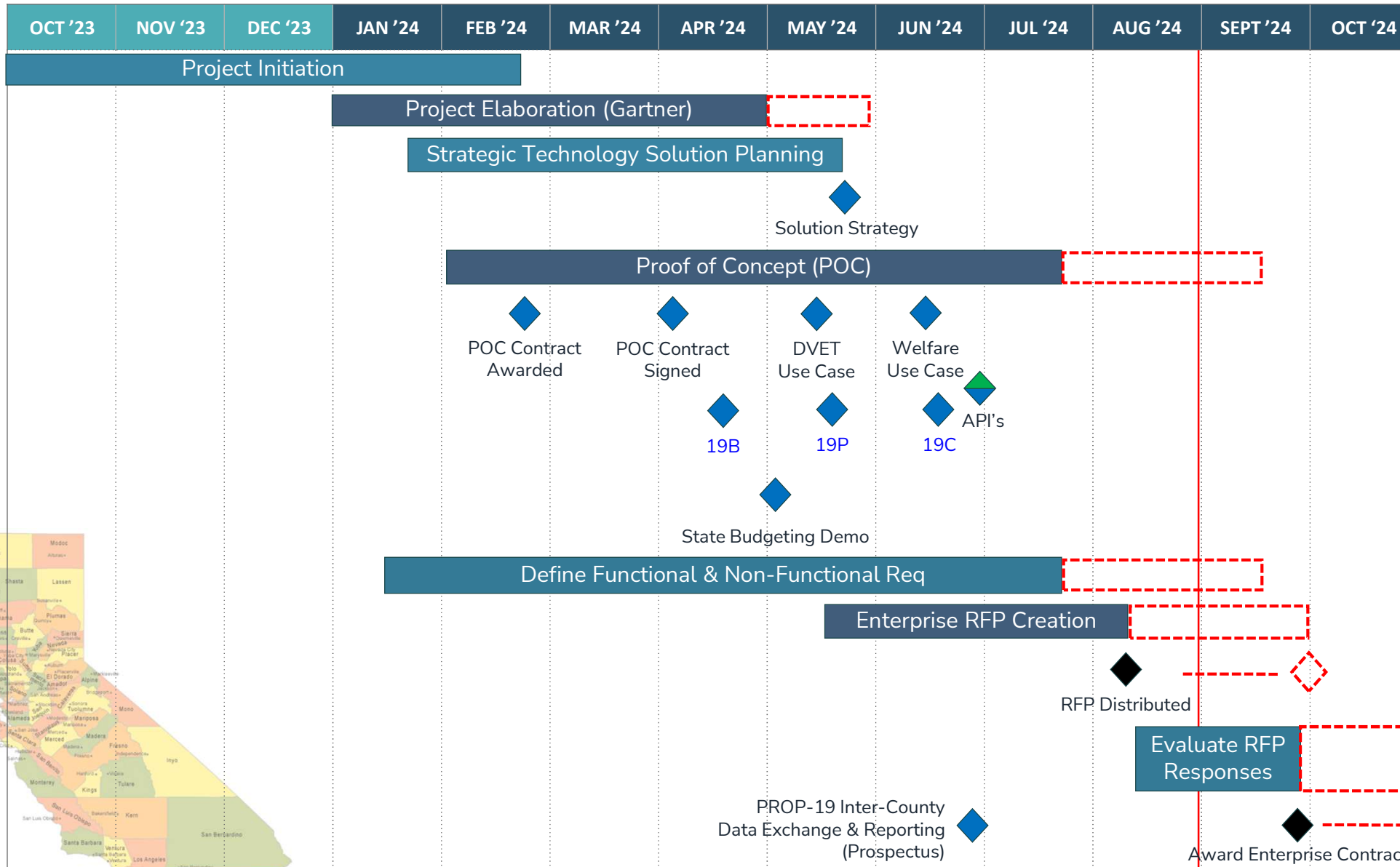
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#6 S#7 S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

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Activities this Week (through 08/30/24):	Upcoming Activities:
<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>
<p>Ongoing: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>	<p>As Needed: Demo Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>
<p>Ongoing: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>	<p>Complete: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>
<p>As Needed: Demo Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>	<p>Complete: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed
- Likely Delay

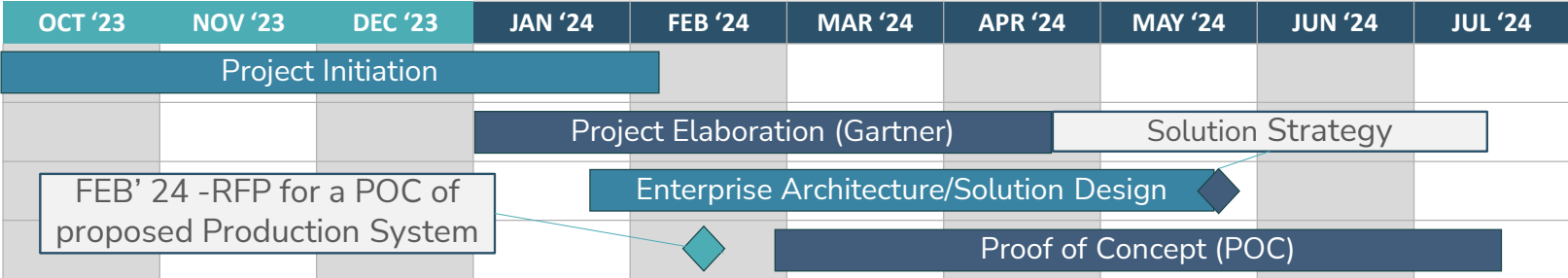


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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	08/23/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



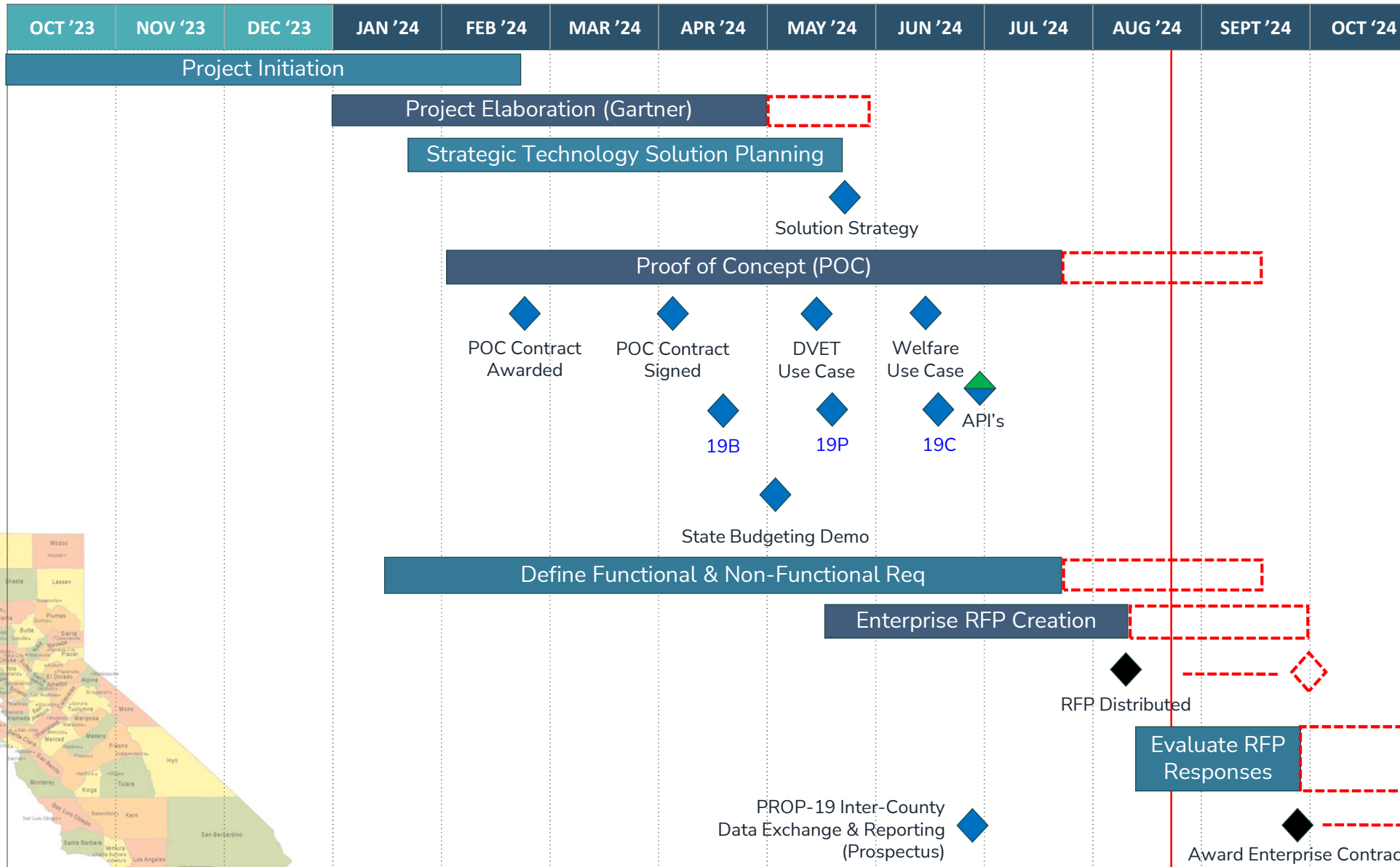
Schedule	On-Track		
Scope	On-Track		
Risk	None.		
Trend	S#6	S#7	S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 08/23/24):	Upcoming Activities:
<p>Completed: August 20th CCAITA JPA Board Meeting: Delivered the presentation of the POC Project P-19 Form 19-C Functionality. Vendor (JA) to assist the delivery to a larger Assessor Audience.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>
<p>Ongoing: RFP Readiness JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>	<p>As Needed: Demo Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>
<p>Ongoing: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>	<p>Complete: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>
<p>Ongoing: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>	<p>Complete: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed
- Likely Delay

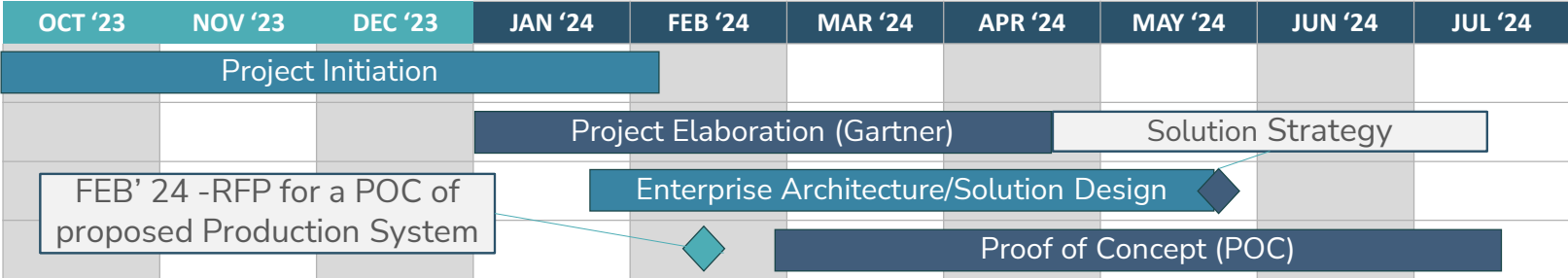


Confidential

TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	08/16/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



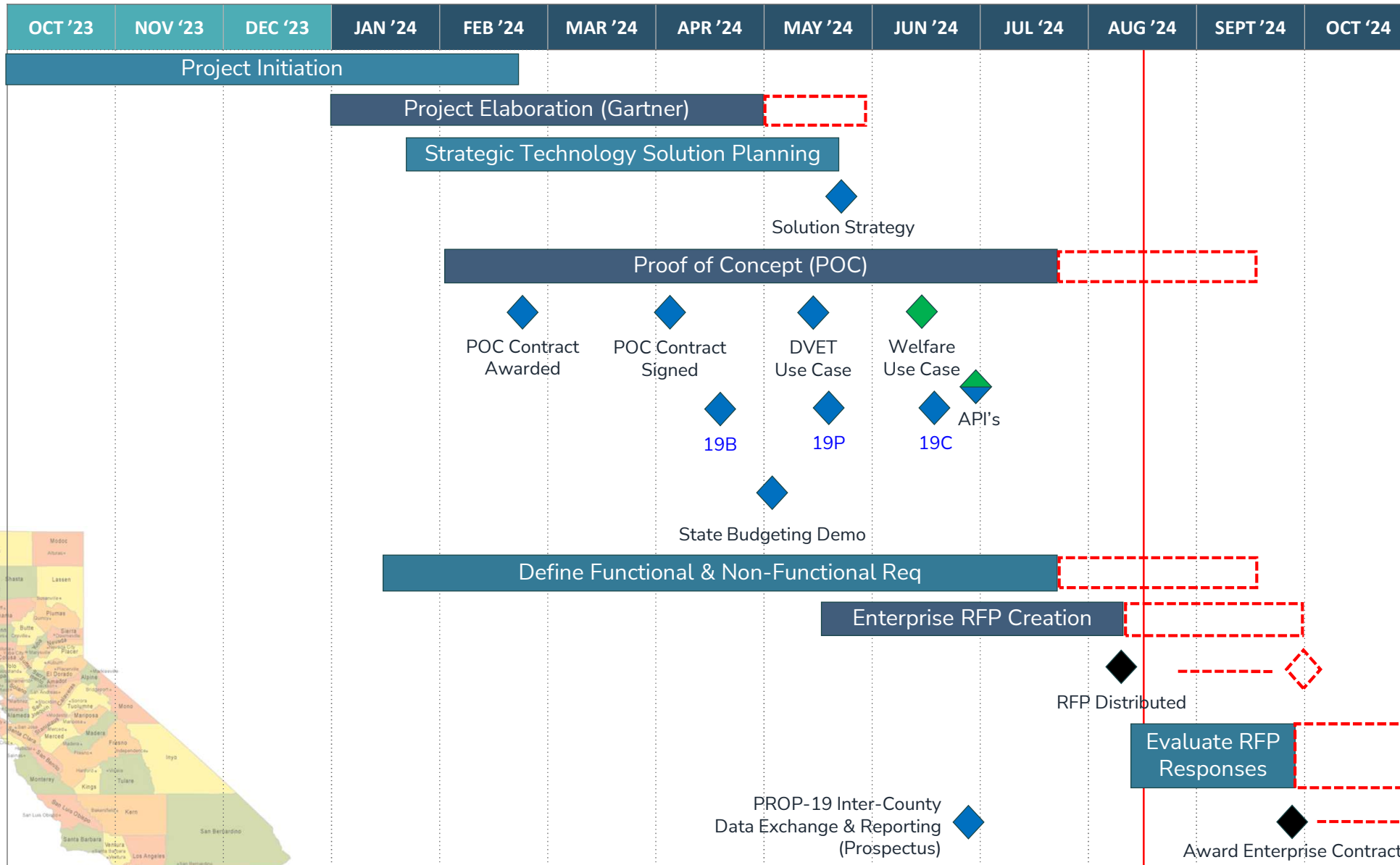
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#6 S#7 S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The project is on track per the approved Scope, Schedule and Budget specifications.
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- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 08/16/24):	Upcoming Activities:
<p>Completed: Confirmed August 20th CCAITA JPA Board Meeting: Preparation to present POC Project P-19 Form 19-C Functionality. Vendor (JA) to chair the delivery to a larger Assessor Audience.</p>	<p>Ongoing: RFP Generation & JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>
<p>Ongoing: RFP Readiness JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p>	<p>As Needed: Demo Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>
<p>Ongoing: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>	<p>Complete: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p>
<p>Ongoing: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>	<p>Complete: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

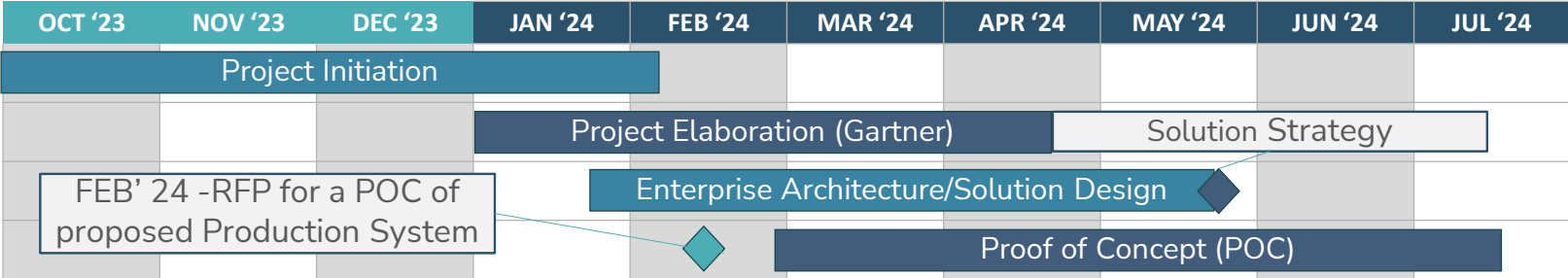


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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	08/09/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



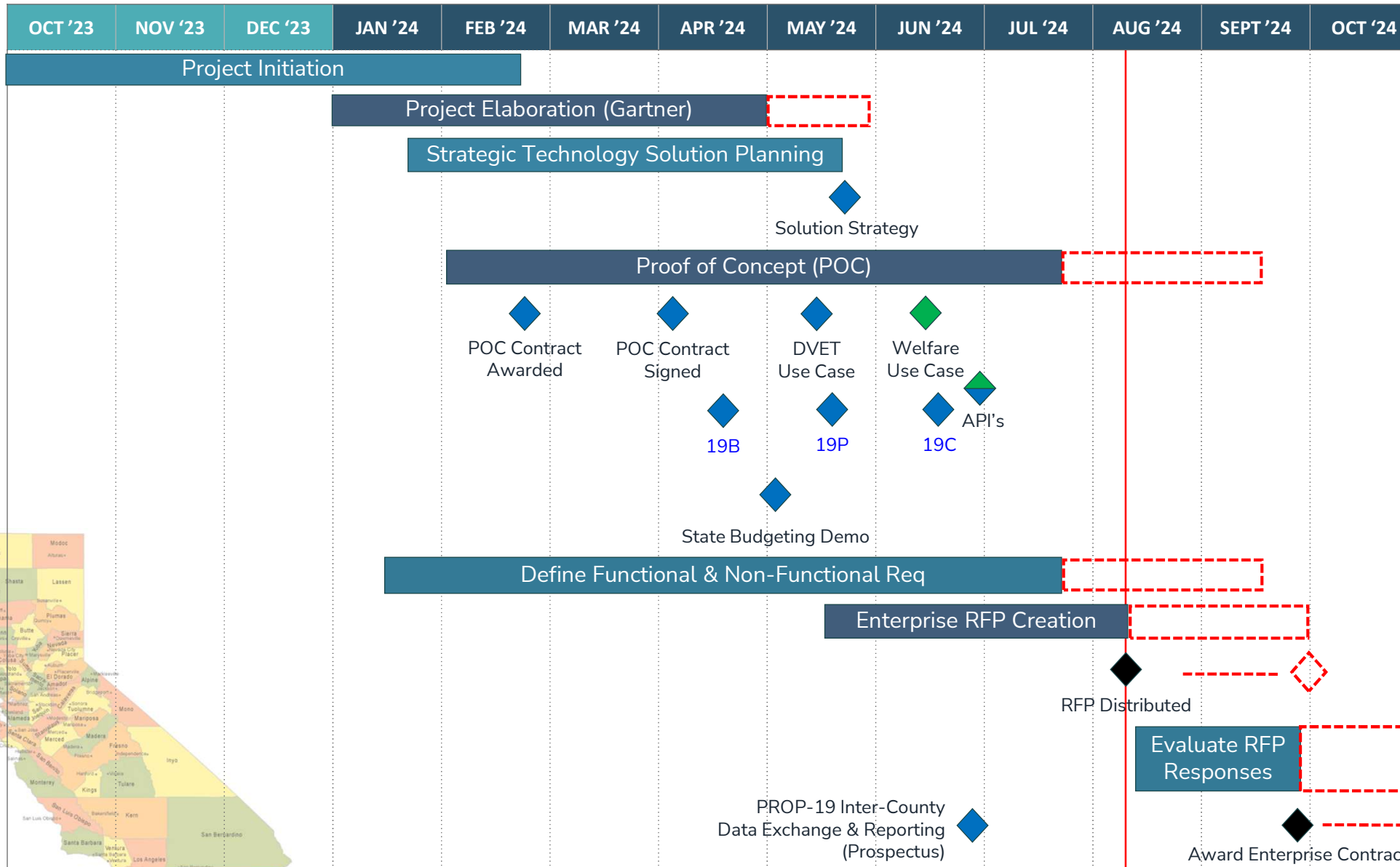
Schedule	On-Track		
Scope	On-Track		
Risk	None.		
Trend	S#6	S#7	S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 08/09/24):	Upcoming Activities:
<p>Completed: CCAITA JPA Board Meeting: Presented Project Update for JUN & JUL 2024 and provided an introduction of the Prospectus with an invitation for 1:1 review. Vendor (JA) delivered their Demonstration.</p> <p>Completed: Sprint #8 Showcase (LAST SHOWCASE) – Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.</p> <p>Completed: Connection/Introduction to Alameda ITD Team for assistance in the RFP Requirements building for the Enterprise Project RFP.</p> <p>Ongoing: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side)</p>	<p>Ongoing: RFP Readiness JPA Roadmap Planning/Preparation: Work with JPA Leadership (Rob & Kan) in the coming weeks to outline the “next-steps” with the RFP (Gartner to on-board) and how the PM’s will assist and divide the work ahead.</p> <p>As Needed: Demo Form 19-C. for Additional Co.’s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p> <p>Ongoing: Project Meetings with JA: P-19 & Exemptions PM’s will continue to meet weekly with JA until the conclusion of the Project and final signoff is granted.</p> <p>Complete: Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side)</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed
- Likely Delay

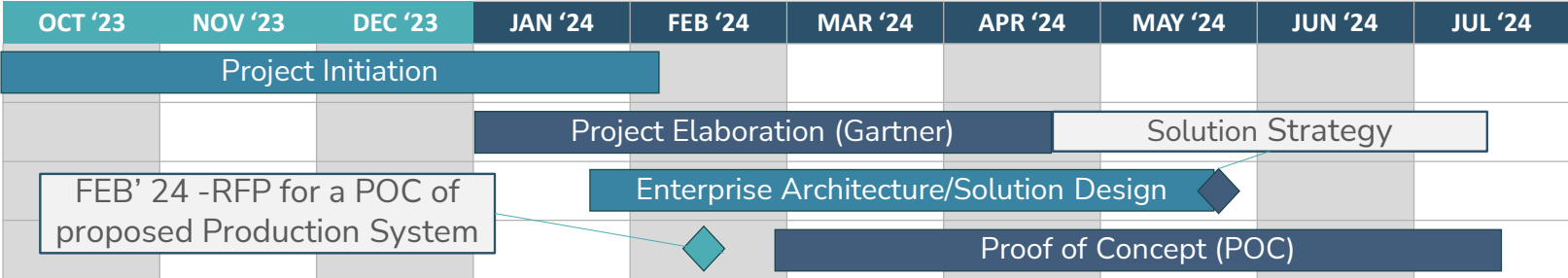


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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	08/02/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



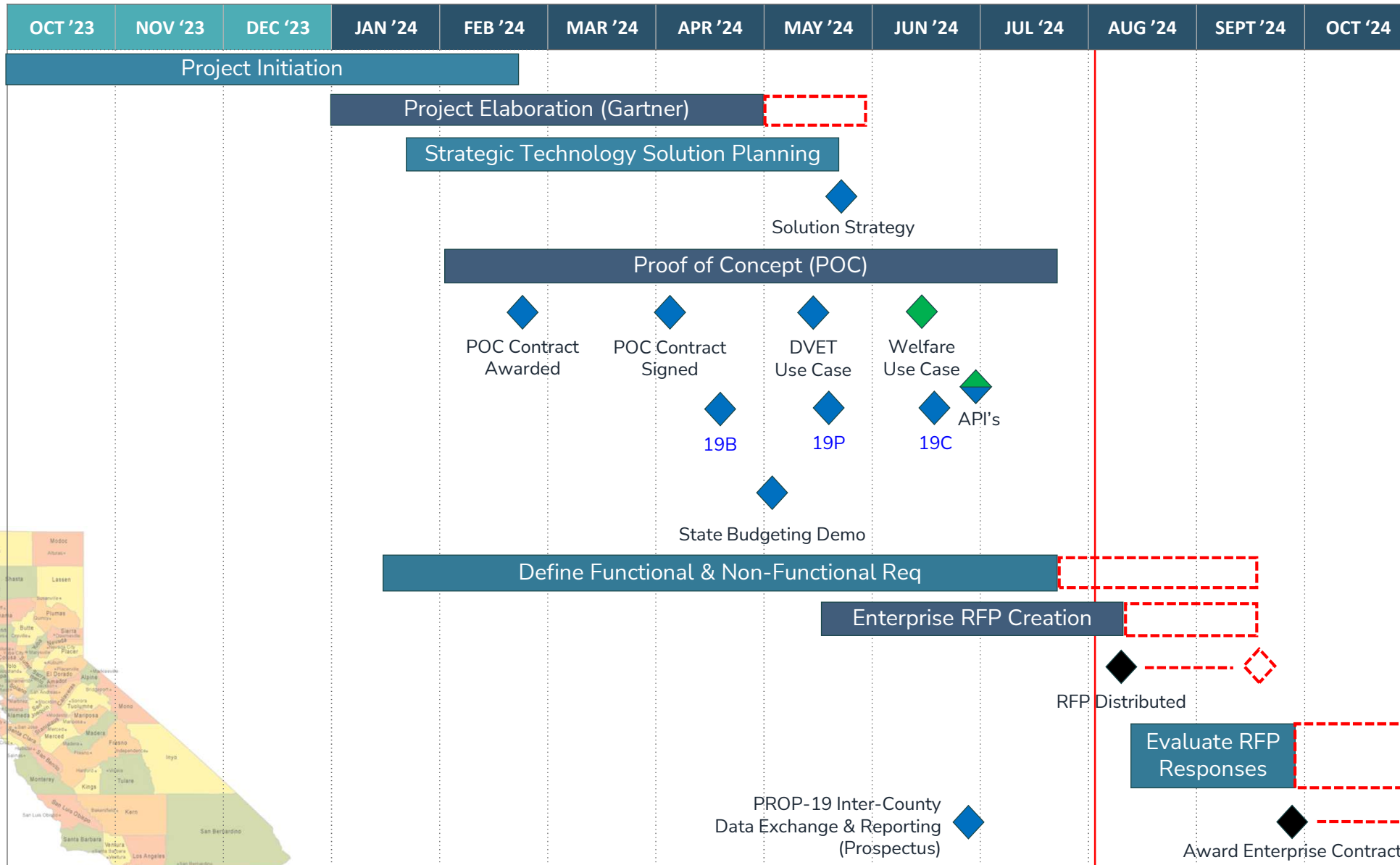
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#6 S#7 S#8

*S#6–Sprint #6, S#7–Sprint #7, S#8–Sprint #8

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 08/02/24):	Upcoming Activities:
<p>Completed: CCAITA JPA Board Meeting Preparation: Collated Dashboards for JUN & JUL 2024 and provided the Prospectus for review at the August 6, 2024, Meeting. Met with Vendor (JA) to prepare their Demonstration. Prepared for a 5 min overview of the P-19 + Exclusions side of the Project.</p>	<p>Deliver/Present: CCAITA JPA Board Meeting Preparation: Review Dashboards for JUN & JUL 2024 and the Prospectus at the August 6, 2024, Meeting. Assist Vendor (JA) to deliver their Demonstration and prepared give a 5 min overview of the P-19 + Exclusions side of the Project.</p>
<p>Completed: Sprint #8 – <i>Goals:</i> Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.</p>	<p>Complete Sprint #8 Showcase (LAST SHOWCASE) – Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.</p>
<p>Completed: Connection/Introduction to Alameda ITD Team for assistance in the RFP Requirements building for the Enterprise Project RFP.</p>	<p>As Needed: Demo Form 19-C. for Additional Co.'s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>
<p>Ongoing: Demo Form 19-C. for Additional Co.'s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>	<p>Complete Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs, and Final Invoice Processing (Exemptions Side)</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

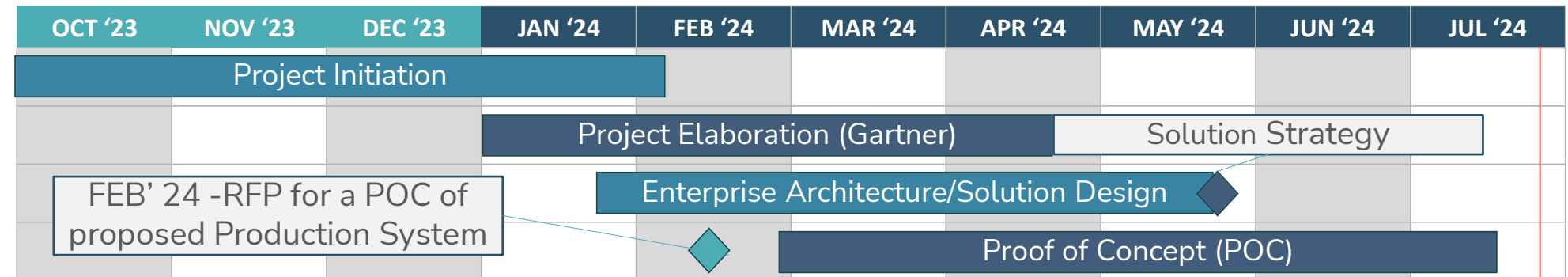


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TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	07/26/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



TIME NOW

Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#5 S#6 S#7

*S#5–Sprint #5, S#6–Sprint #6, S#7–Sprint #7,

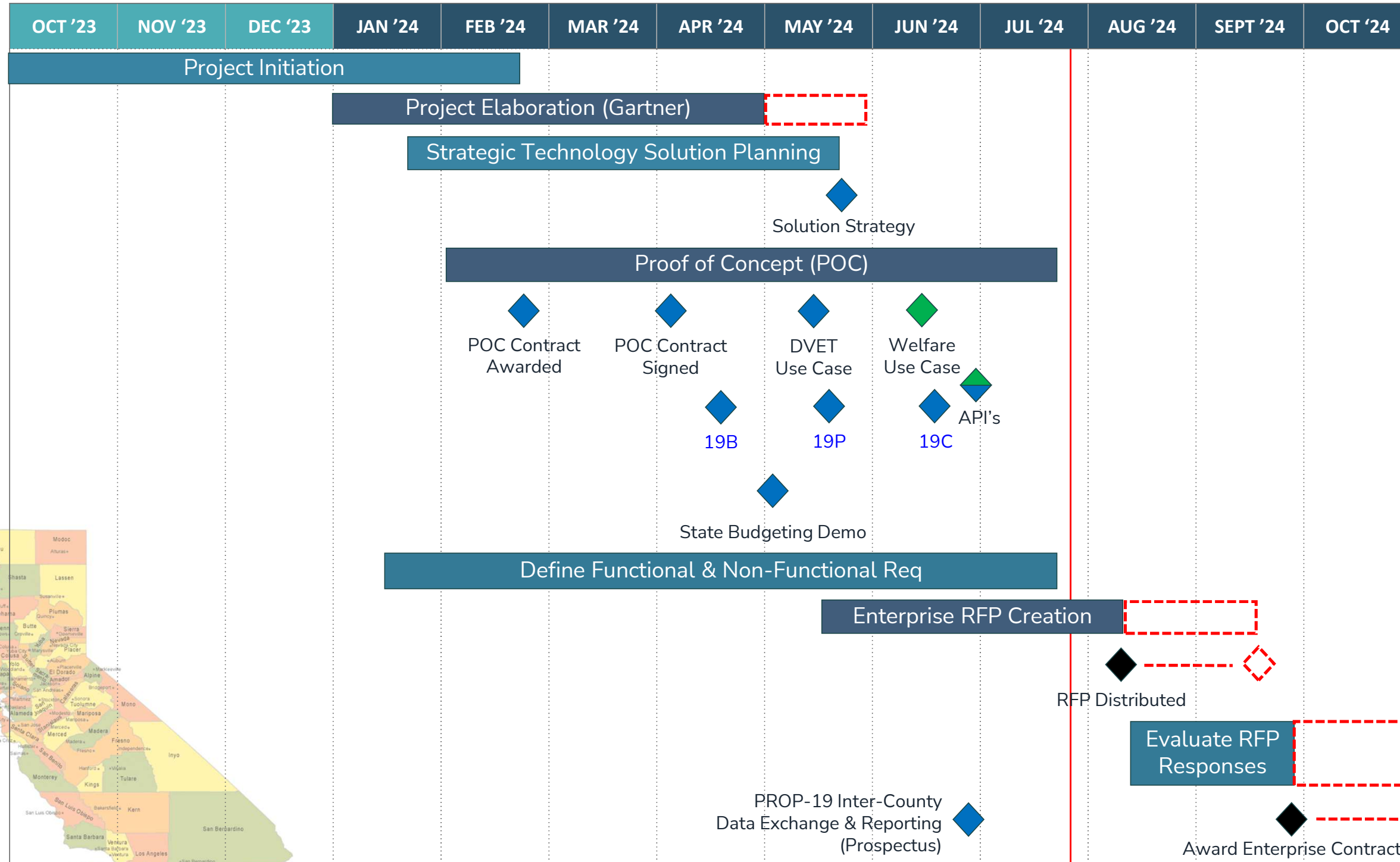
■ The project is on track per the approved Scope, Schedule and Budget specifications.

■ The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.

■ The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 07/26/24):	Upcoming Activities:
Completed: Configuration for Pro-Active Email: Pro-Active Email communication for the final cycles. Additional Forms Support.	Approve/Complete Form 19-C (Invoice Processing) – All work completed.
Completed: Sprint #7 Showcase - Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.	Complete Sprint #8 (LAST SPRINT) – Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.
Completed: Connection/Introduction to BOE for the Enterprise Project. Anticipate 1 st Meeting week of 7/29/24. Discuss/Review PROP-19 Inter-County Data Exchange System & Portal + Exclusions.	Demo Form 19-C. for Additional Co.'s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)
Continued: Sprint #8 – Goals: Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.	Complete Project Closing Activities: Evaluation, Artifact Archive, Code Archive, Survey Feedback, Stakeholder Feedback, Lessons Learned, RFP Inputs.

High-Level Project Schedule



Milestone Legend

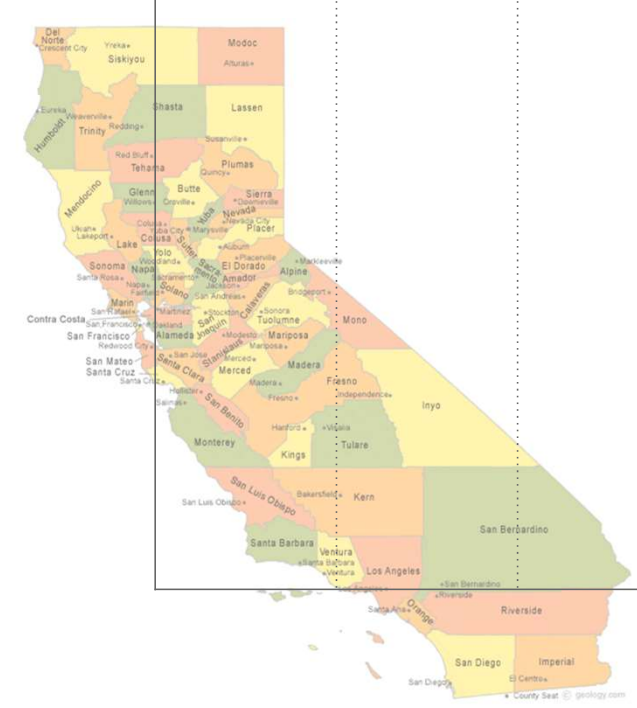
- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

□ Likely Delay

PROP-19 Inter-County Data Exchange & Reporting (Prospectus)

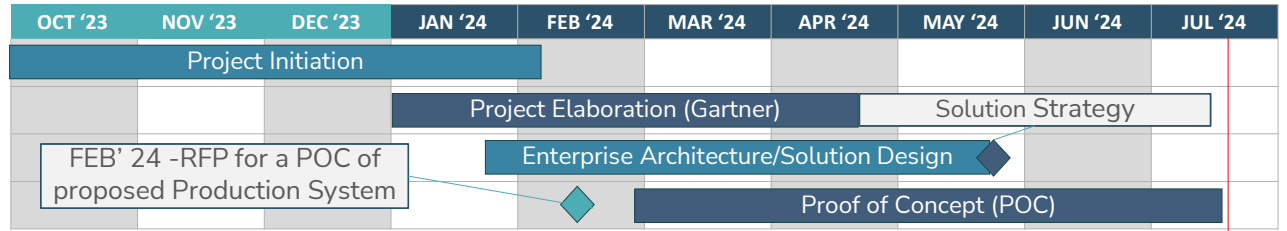
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TIME NOW



PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	07/19/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



TIME NOW

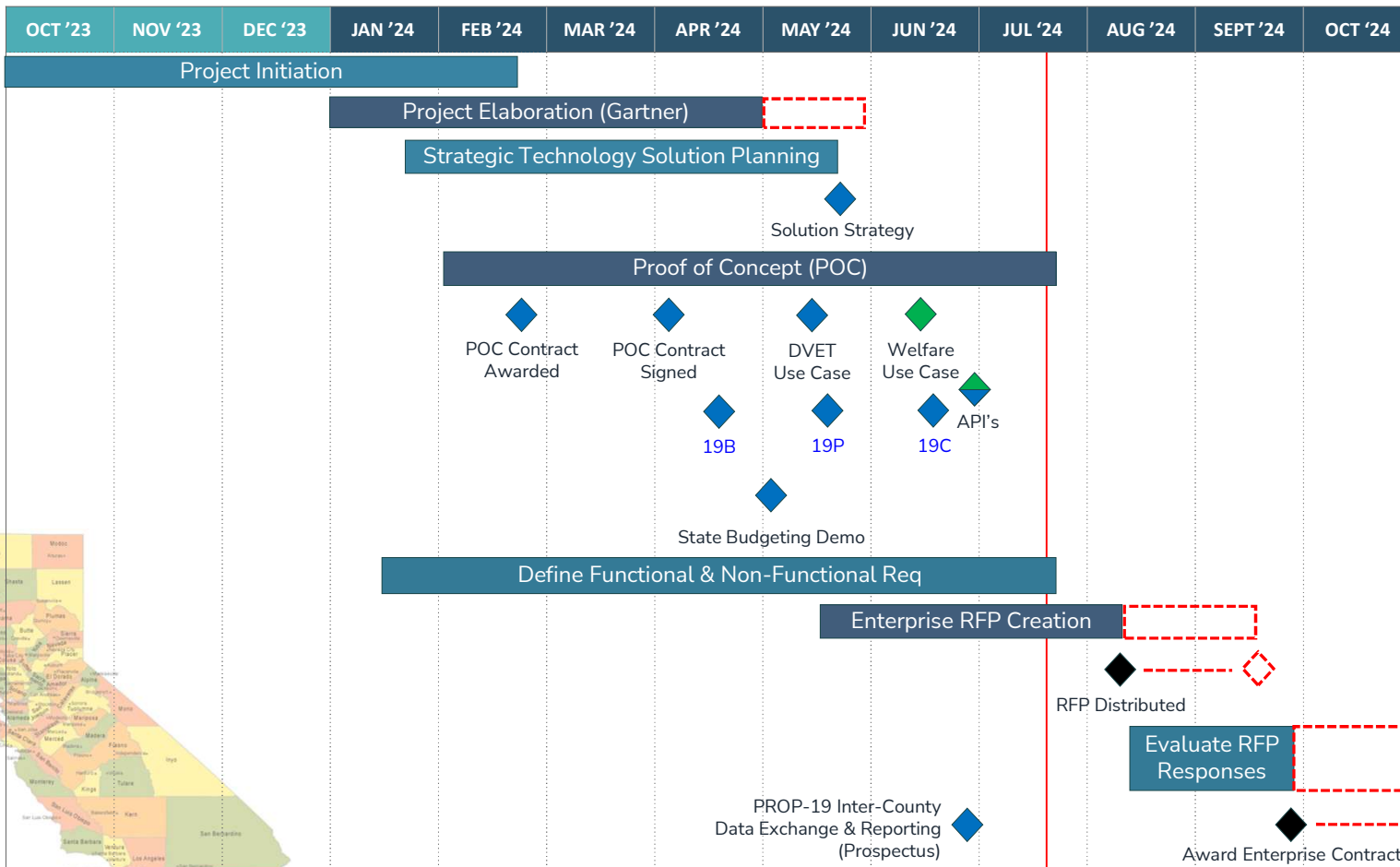
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#5 S#6 S#7

*S#5–Sprint #5, S#6–Sprint #6, S#7–Sprint #7,

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 07/19/24):	Upcoming Activities:
Continue: Configuration for Pro-Active Email: Pro-Active Email communication for the final cycles. Additional Forms Support.	Complete: Configuration for Pro-Active email communication for the final cycles. Additional Forms Support.
Completed: Sprint #7 & Metrics Review - Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.	Approve/Complete Form 19-C (Invoice Processing) – All work completed: Published to the Testers, workshop scheduled for completion in this Sprint as planned.
Launched Sprint #8 – Goals: Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.	Continue Sprint #8 (LAST SPRINT) – Task History (Filtering & Pagination), Export Task History, Internal Task Notes, Logging Correspondence, Add events for file uploads to task history.
Completed: DEMO Form 19-C. for Placer Co. - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)	Demo Form 19-C. for Additional Co.'s per Request - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)
Completed: Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)	Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time. Continue on developing Post-POC Survey for Vendor Performance.
Completed: Publish Prospectus & Appendix v.2: Final Version.v.2: PROP-19 Inter-County Data Exchange System & Portal + Exclusions.	Complete: Configuration for Pro-Active Email; Pro-Active Email communication for the final cycles. Additional Forms Support.

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

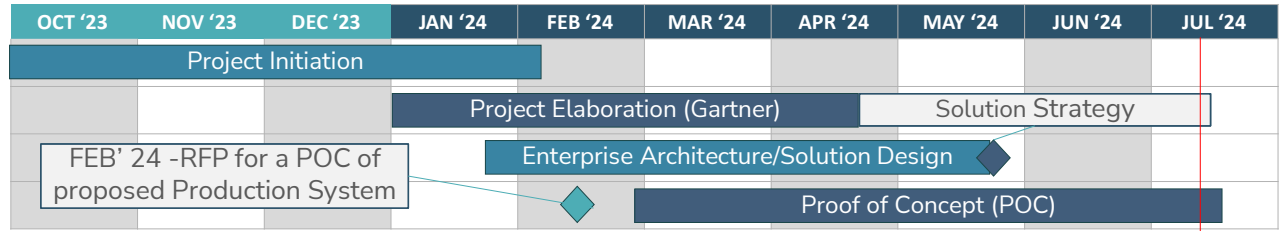


PROP-19 Inter-County Data Exchange & Reporting (Prospectus)

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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	07/12/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



TIME NOW

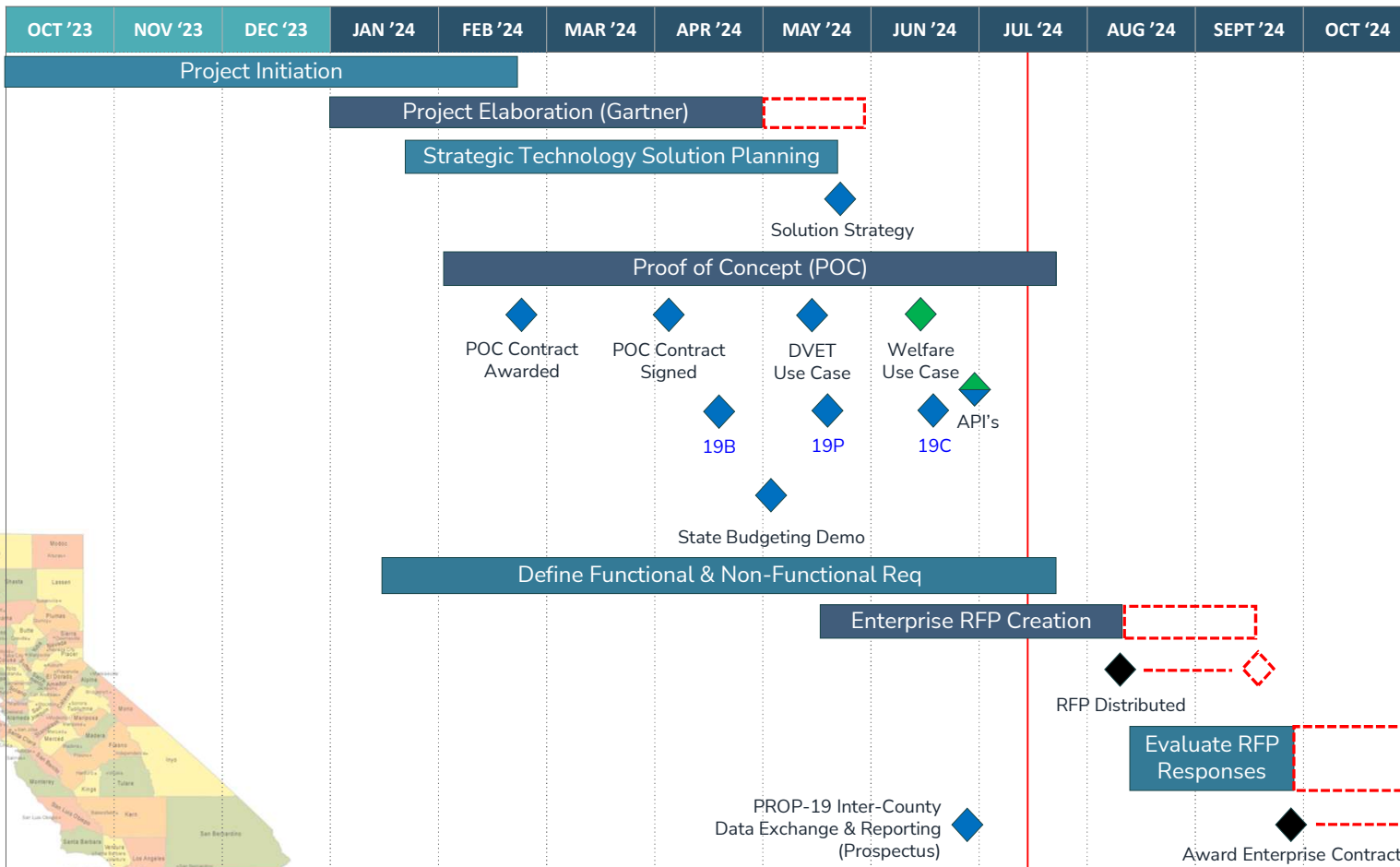
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#4 S#5 S#6

*S#4–Sprint #4, S#5–Sprint #5, S#6–Sprint #6

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 07/12/24):	Upcoming Activities:
<p>Completed Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</p>	<p>Complete Sprint #7 –Finalize the API Design & Documentation. (Exemptions: PTMS/API & Remaining Scope)</p>
<p>Completed: Sprint #6 Metrics Review - Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.</p>	<p>Approve/Complete Form 19-C (Invoice Processing) – All work completed: Published to the Testers, workshop scheduled for completion in this Sprint as planned.</p>
<p>Continued: Configuration for Pro-Active Email: Pro-Active Email communication for the final cycles. Additional Forms Support.</p>	<p>Begin configuration for Pro-Active email communication for the final cycles. Additional Forms Support.</p>
<p>Continued: Maintained Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings scheduled around Vacations.</p>	<p>Demo Form 19-C. for Placer Co. - (POC Functionality to date. As Time Permits, discuss the Data Exchange, options of Installation.)</p>
<p>Continued: Sprint #7 – Maximizing Remaining JA Time. (Internal task notes, Logging Correspondence, Task History Pagination.)</p>	<p>Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.</p>
<p>Continued: Aversion #2 (v.2) of Prospectus & Appendix: PROP-19 Inter-County Data Exchange System & Portal + Exclusions.</p>	<p>Publish Prospectus & Appendix v.2: Final Version.v.2: PROP-19 Inter-County Data Exchange System & Portal + Exclusions.</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay



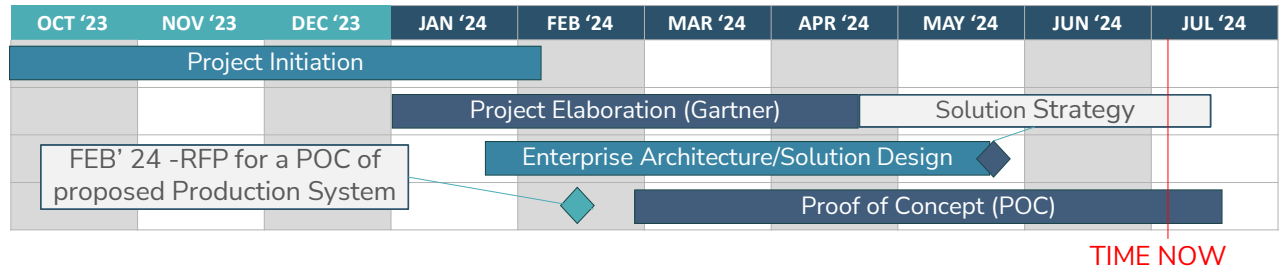
PROP-19 Inter-County Data Exchange & Reporting (Prospectus)

Confidential

TIME NOW

PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	07/05/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



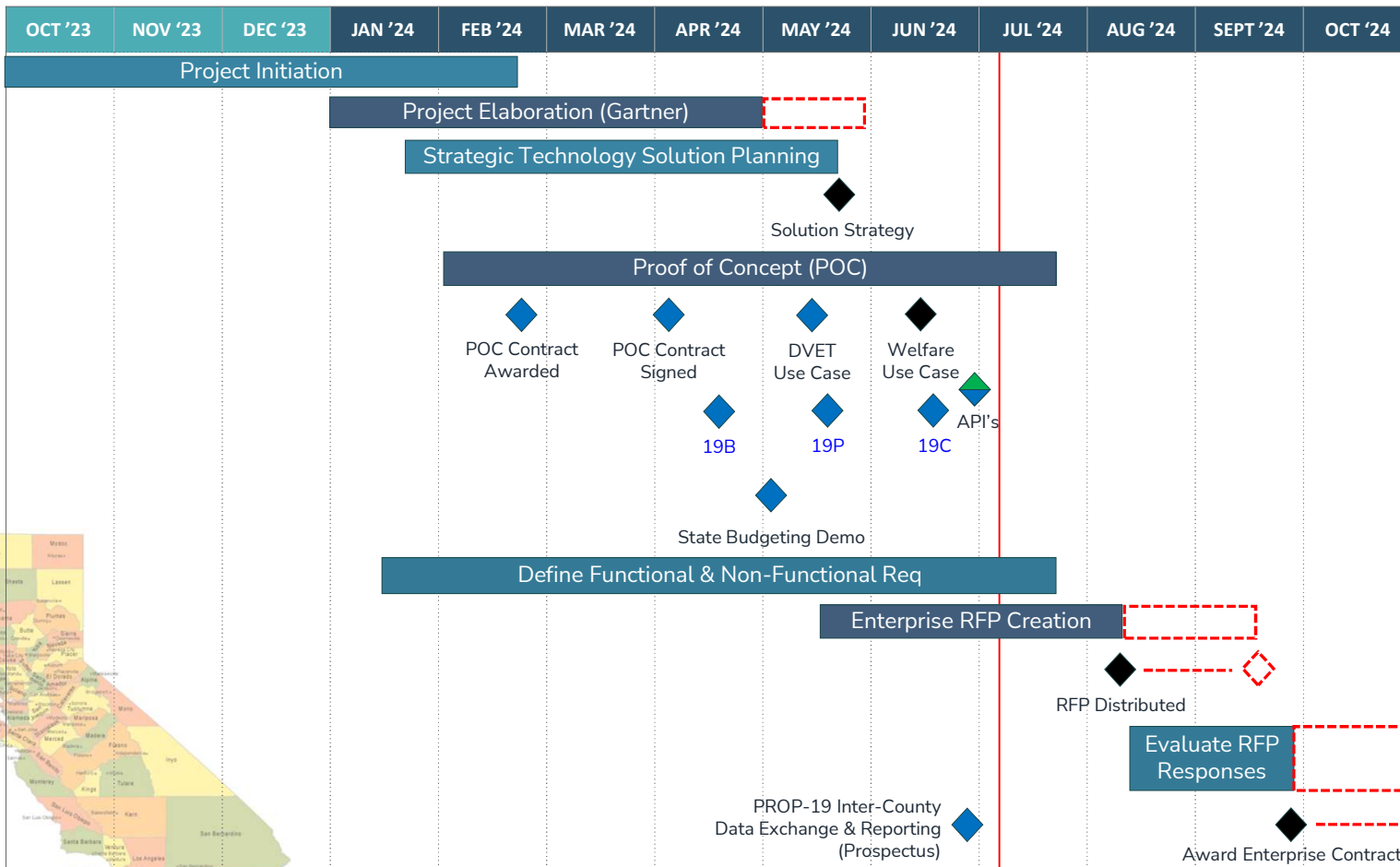
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#4 S#5 S#6

*S#4–Sprint #4, S#5–Sprint #5, S#6–Sprint #6

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 07/05/24):	Upcoming Activities:
Completed: Launched: Sprint #7 – Maximizing Remaining JA Time for Value.	Continue Sprint #7 –Finalize the API Design & Documentation.
Completed: Sprint #6 - Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.	Approve/Complete Form 19-C (Invoice Processing) – All work completed: Published to the Testers, workshop scheduled for completion in this Sprint as planned.
Continued: Configuration for Pro-Active Email: Pro-Active Email communication for the final cycles. Additional Forms Support.	Begin configuration for Pro-Active email communication for the final cycles. Additional Forms Support.
Completed Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)	Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)
Continued: Maintained Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.	Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.
Completed: Appendix: Final Version: PROP-19 Inter-County Data Exchange System & Portal + Exclusions (Prospectus).	Submit Appendix: Final Version: PROP-19 Inter-County Data Exchange System & Portal + Exclusions (Prospectus).

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

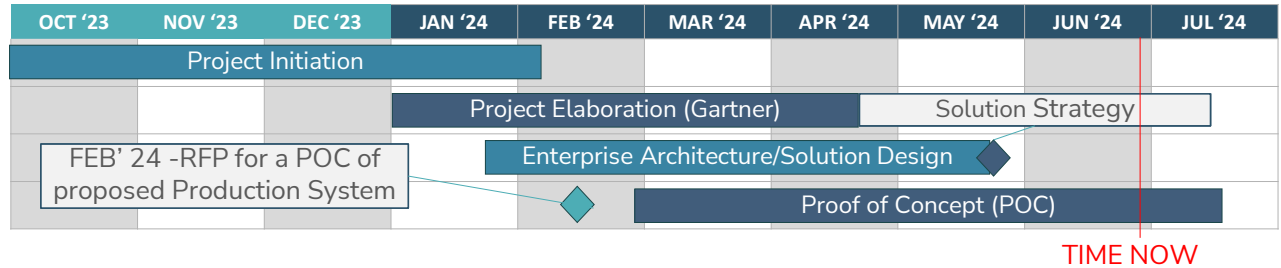
▭ Likely Delay

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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	06/28/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



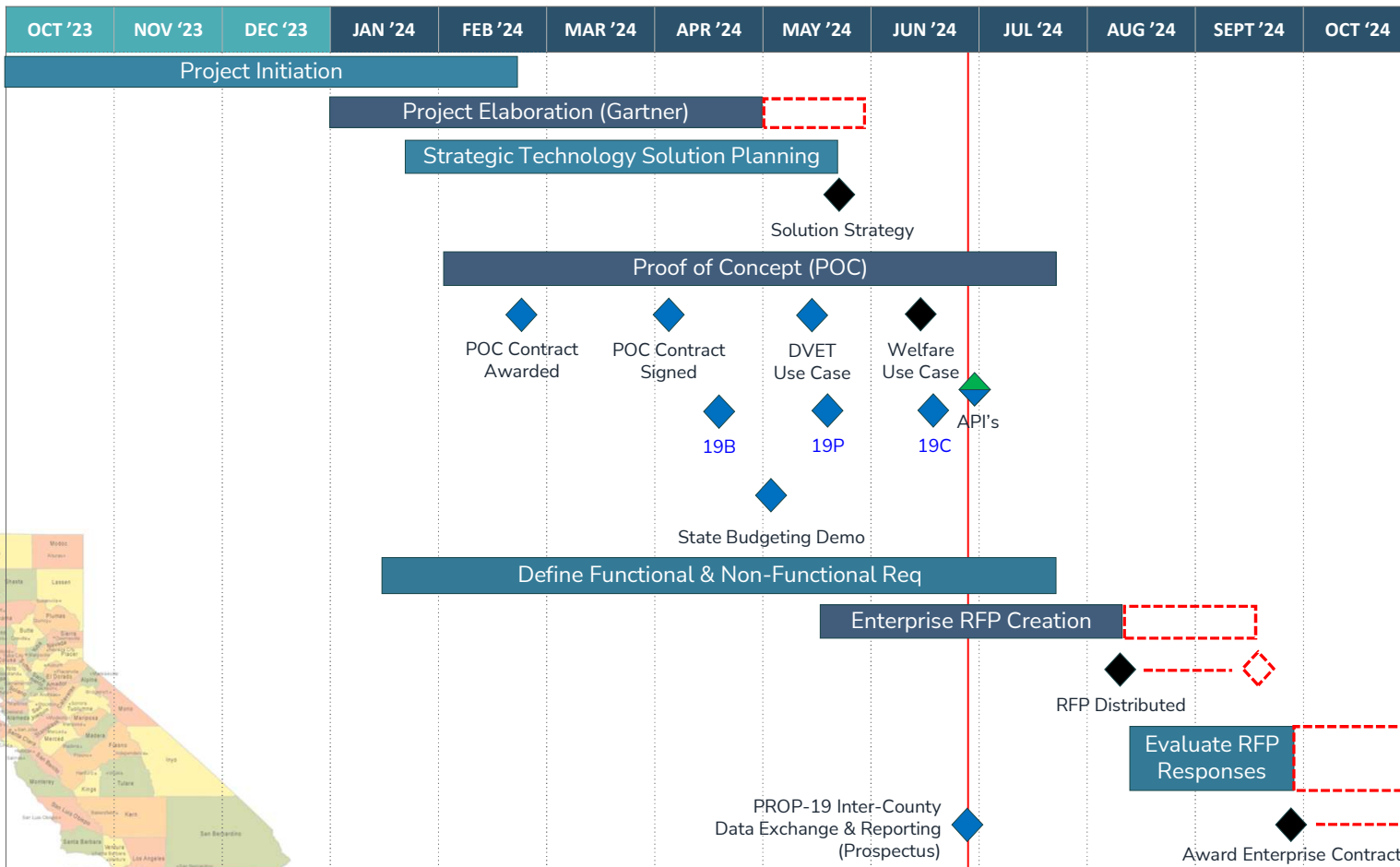
Schedule	On-Track
Scope	On-Track
Risk	None.
Trend	S#3 S#4 S#5

*S#3–Sprint #3, S#4–Sprint #4, S#5–Sprint #5

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 06/28/24):	Upcoming Activities:
<p>Completed: Sprint #5 Metrics Analysis – Goals: 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</p> <p>Continued: Sprint #6 - Prioritized usage of the remaining JA Time to maximize the value of the POC Project.</p> <p>Continued: Configuration for Pro-Active Email: Pro-Active Email communication for the final cycles. Additional Forms Support.</p> <p>Completed Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</p> <p>Maintained Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.</p> <p>Completed: Submittal of Version No.1: PROP-19 Inter-County Data Exchange System & Standardized Reporting (Prospectus). 30+ Page Appendix (technical detail validation efforts continue) will follow within 1 business day.</p>	<p>Complete Sprint #6 – Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.</p> <p>Approve/Complete Form 19-C (Final Test Cases) – Published to the Testers, workshop scheduled for completion in this Sprint as planned.</p> <p>Begin configuration for Pro-Active email communication for the final cycles. Additional Forms Support.</p> <p>Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</p> <p>Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.</p> <p>Complete & Submit Appendix: Final Version: PROP-19 Inter-County Data Exchange System & Portal + Exclusions (Prospectus). Delivery NLT COB MON 07.01.24.</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

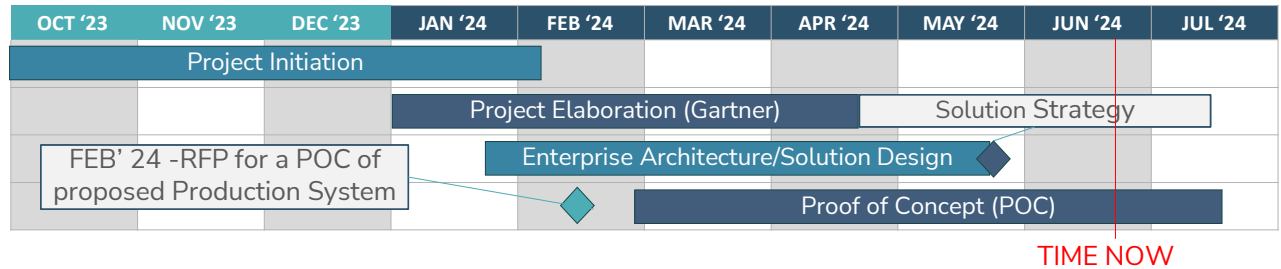
▭ Likely Delay



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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	06/21/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



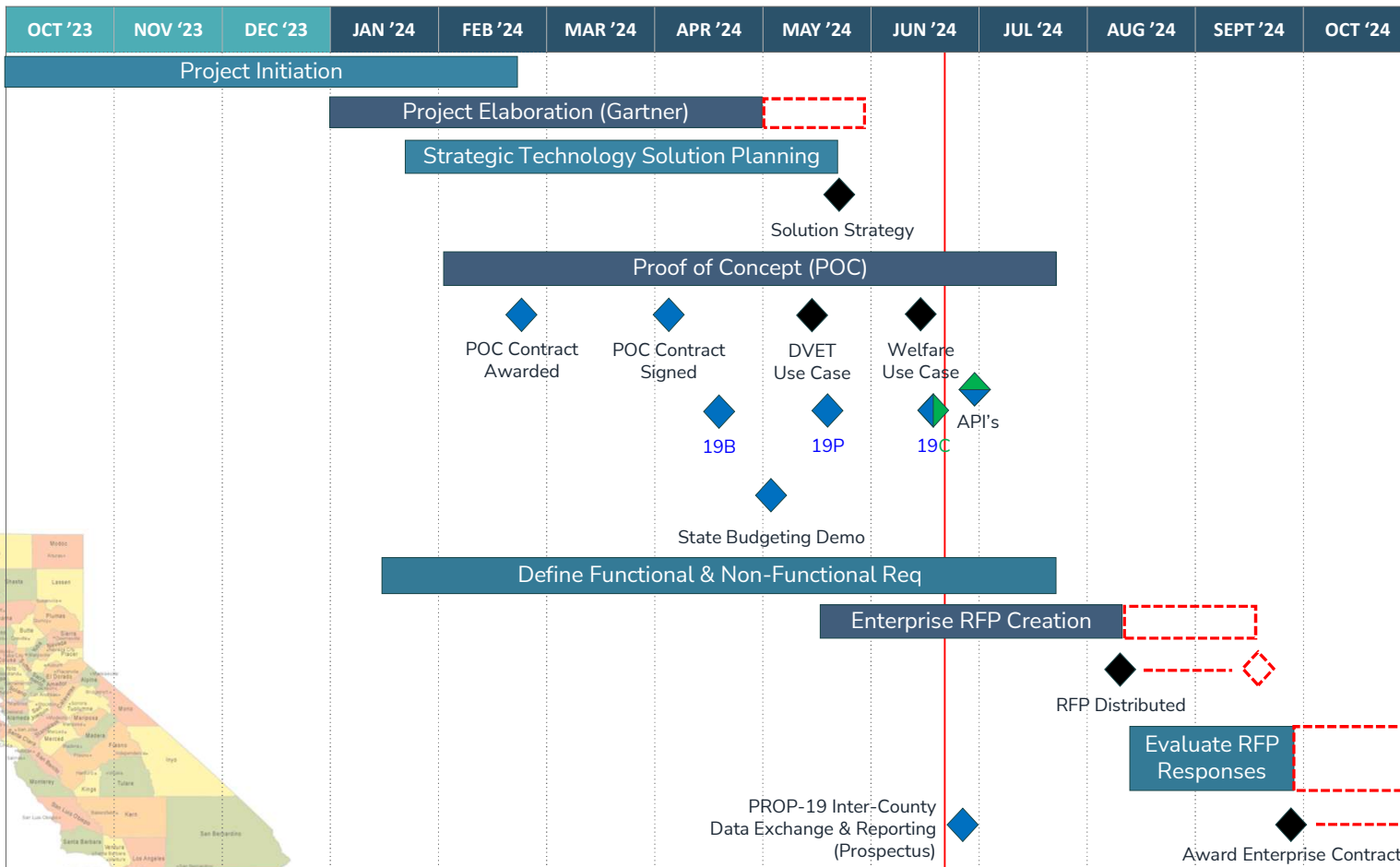
Schedule	On-Track		
Scope	On-Track		
Risk	None.		
Trend	S#3	S#4	S#5

*S#3–Sprint #3, S#4–Sprint #4, S#5–Sprint #5

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 06/21/24):	Upcoming Activities:
<p>Completed: Sprint #5 – Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</p> <p>Launched Sprint #6 - Review of Sprint #6 & Beyond for prioritized usage of the remaining JA Time to maximize the value of the POC Project.</p> <p>Completed JA Meeting over Sprint #7 & #8 - Planning and Backlog Grooming to streamline the remaining scope (primarily focus upon automation and email alerts) to increase overall POC Project-Value.</p> <p>Completed JA/PM/PO Sync Planning (Sprint #7 & #8) – Review of We are on-target and keeping pace as planned/scheduled.</p> <p>Competed First Draft for the API Connection & Design. – (Riverside, Sacramento, & LA.)</p> <p>Completed: 1st Iteration (Framework): PROP-19 Inter-County Data Exchange System & Standardized Reporting (Prospectus).</p>	<p>Continue Sprint #6 – Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Finalize the API Design & Documentation.</p> <p>Approve/Complete Form 19-C (Final Test Cases) – Published to the Testers, workshop scheduled for completion in this Sprint as planned.</p> <p>Begin configuration for Pro-Active email communication for the final cycles. Additional Forms Support. Development ongoing for the Calculators for Form 19-B, and the Calculator for Form 19-C.</p> <p>Complete Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</p> <p>Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Meetings will be scheduled around Vacation Time.</p> <p>Complete & Submit: Final Version: PROP-19 Inter-County Data Exchange System & Portal + Exclusions (Prospectus).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

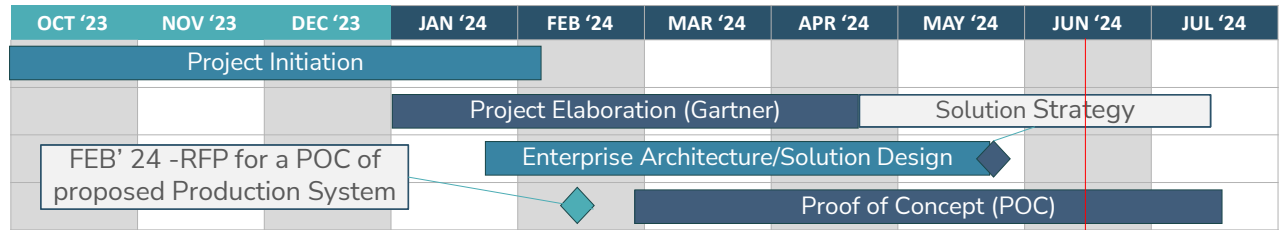
TIME NOW

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PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	06/14/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



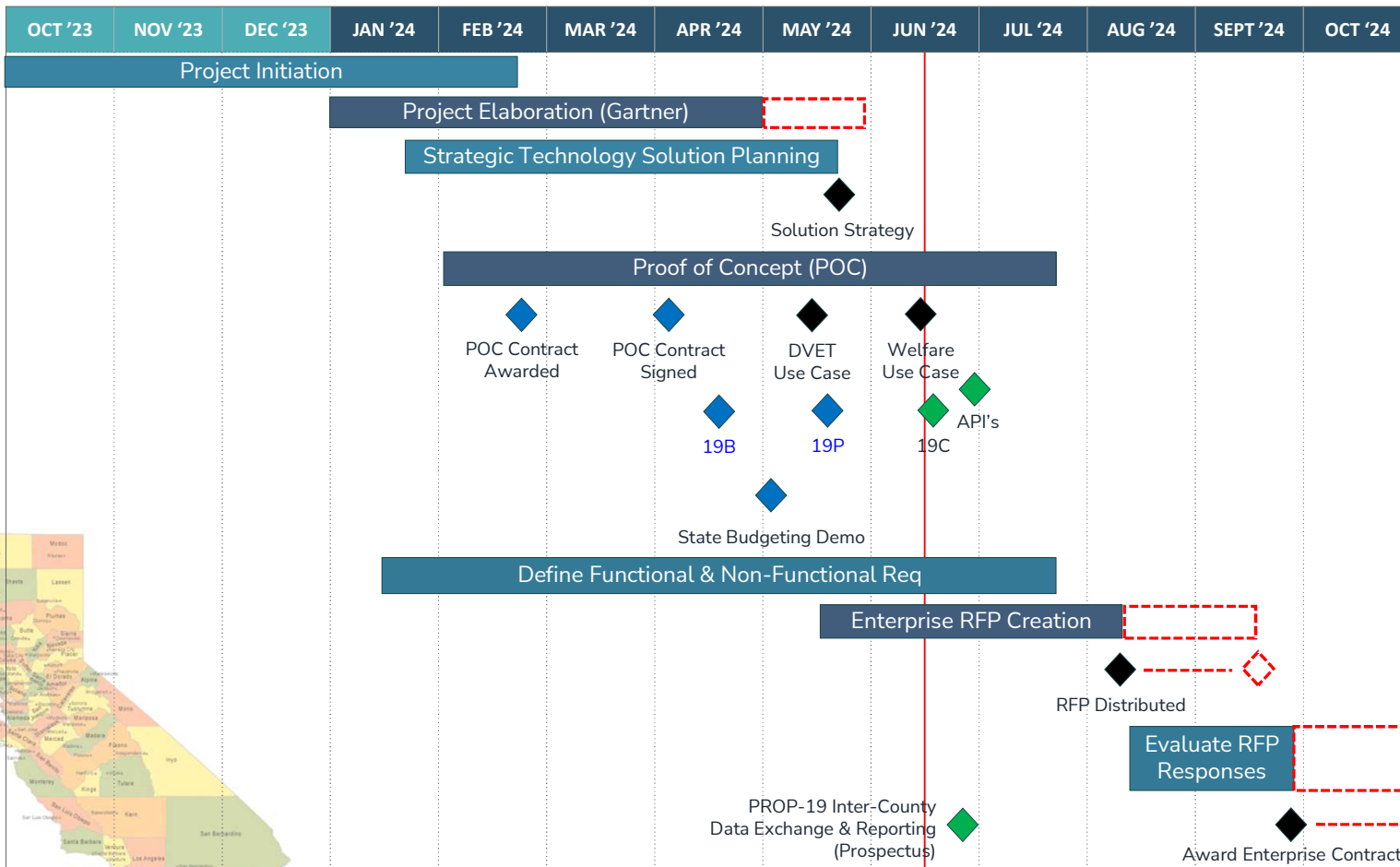
Schedule	On-Track		
Scope	On-Track		
Risk	None.		
Trend	S#2	S#3	S#4

*S#2–Sprint #2, S#3–Sprint #3, S#4–Sprint #4

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 06/14/24):	Upcoming Activities:
<p>Completed 1st Modoc Megabyte Demonstration – Review w/JA on “how” Modoc County enters data and uses MB for Prop-19 and Exemptions. Thank You Kristen ! (Follow-up Meeting: Pending)</p> <p>Completed Part #3 in the Series for the API Connection & Design Discussions. – (Riverside, Sacramento, & LA.)</p> <p>Completed JA Meeting over Sprint #7 & #8 - Planning and Backlog Grooming to streamline the remaining scope (primarily focus upon automation and email alerts) to increase overall POC Project-Value.</p> <p>Completed Sprint #6 Planning & Prioritization Meeting – Review of Sprint #6 & Beyond for prioritized usage of the remaining JA Time to maximize the value of the POC Project.</p> <p>Completed JA/PM/PO Sync Planning (Sprint #6 & #7) – Review of Sprint #5 Metrics, Carry Overs, and Insertions. We are on-target and keeping pace as planned/scheduled.</p> <p>Continued: Sprint #5 – Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</p>	<p>Complete Sprint #5 – Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</p> <p>Approve/Complete Form 19-C (Final Test Cases) – Published to the Testers, workshop scheduled for completion in this Sprint as planned.</p> <p>Begin configuration for Pro-Active email communication for the final cycles. Additional Forms Support. Development ongoing for the Calculators for Form 19-B, and the Calculator for Form 19-C.</p> <p>Complete Testing for Approved Delivery of Form 19-C. - (Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</p> <p>Maintain Velocity & Delivery, Continue Maximizing Remaining JA Time for Value. Summer vacations began, meetings will be scheduled around Vacation Time.</p> <p>Review: 1st Iteration (Framework): PROP-19 Inter-County Data Exchange System & Standardized Reporting (Prospectus).</p>

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

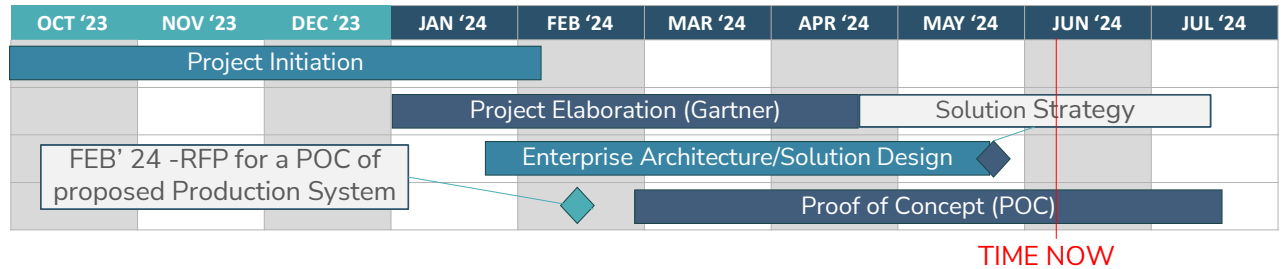
▭ Likely Delay

Confidential
TIME NOW



PROP-19 PROJECT MANAGEMENT DASHBOARD

Project Name	JPA Prop-19
Project Manager	Justin Winn
Status Date	06/07/2024
Project Description	Creation of Inter-County System to facilitate Data Exchange & Reporting for all 58 California Counties.



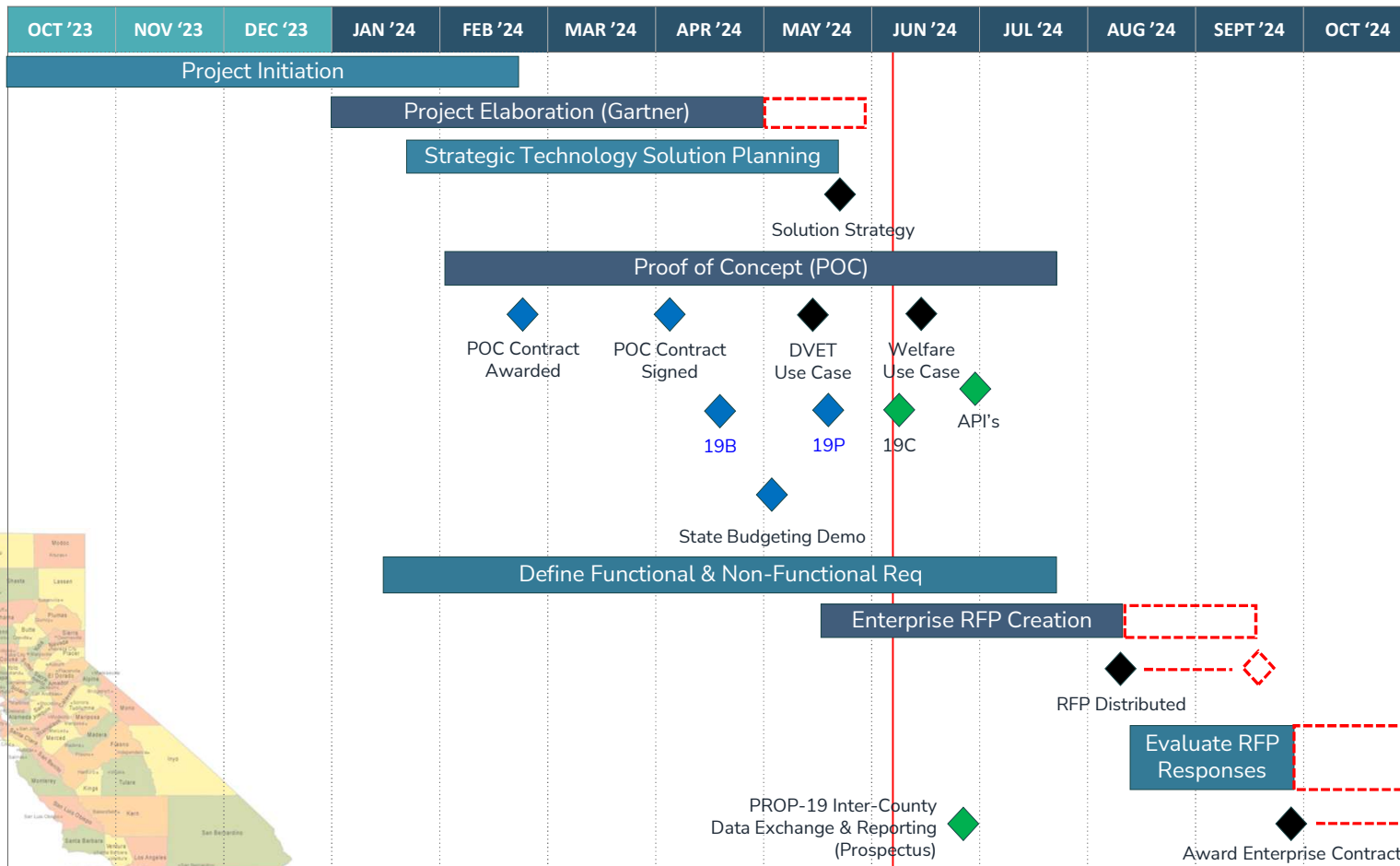
Schedule	On-Track		
Scope	On-Track		
Risk	None.		
Trend	S#1	S#2	S#3

*S#1–Sprint #1, S#2–Sprint #2, S#3–Sprint #3

- The project is on track per the approved Scope, Schedule and Budget specifications.
- The project is experiencing challenges, still expected to substantially meet the Scope, Schedule, & Budget specifications.
- The project is at risk of Scope, Schedule and Budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 06/07/24):	Upcoming Activities:
Completed JA/PM/PO Sync Planning (Sprint #5 & #6) – Review of Sprint #4 Metrics, Carry Overs, and Insertions. We are on-target and keeping pace as planned/scheduled.	Continue Sprint #5 – <i>Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</i>
Completed Sprint #4 - Sprint #4 <i>Goals: 19-C Data Exchange for Unique County Workflows & Tools, Shared File Uploads in Data Exchange, E-Signature Compliance & DocuSign Requirements.</i>	JA Meeting over Sprint #7 & #8 - Planning and Backlog Grooming to streamline the remaining scope (primarily focus upon automation and email alerts) to increase overall POC Project-Value.
Completed Form 19-C Final Test Cases – Published to the Testers, and on-track for completion in this Sprint as planned.	Complete Part #3 in the Series for the API Connection & Design Discussions. – <i>(Riverside, Sacramento, & LA.)</i>
Completed Launch Sprint #5 – <i>Goals: Complete 19-C Testing, Design the Form 19-B Calculator, Design the Form 19-P Calculator, Complete Round 3 of 3 for the API Design & Documentation.</i>	Complete Testing for Approved Delivery of Form 19-C. - <i>(Additional Improvements - as Time Permits - to the Data Exchange, Review for Opportunity is On-Going with JA Engineering Team.)</i>
Completed San Joaquin Megabyte Demonstration – Review w/JA on “how” San Joaquin County enters data and uses MB for Prop-19 and Exemptions. Thank You Carmen & Steve!	Maintain Velocity & Delivery, Summer vacations starting soon, Meetings Scheduled around Vacation Time. – <i>(No Impact to Sprint Plan due to Holiday.)</i>
Completed Sprint #5 Planning & Prioritization Meeting – Review of Sprint #5 & Beyond for prioritized usage of the remaining JA Time to maximize the value of the POC Project.	Review: 1 st Iteration (Framework): PROP-19 Inter-County Data Exchange System & Standardized Reporting (Prospectus).

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Completed

▭ Likely Delay

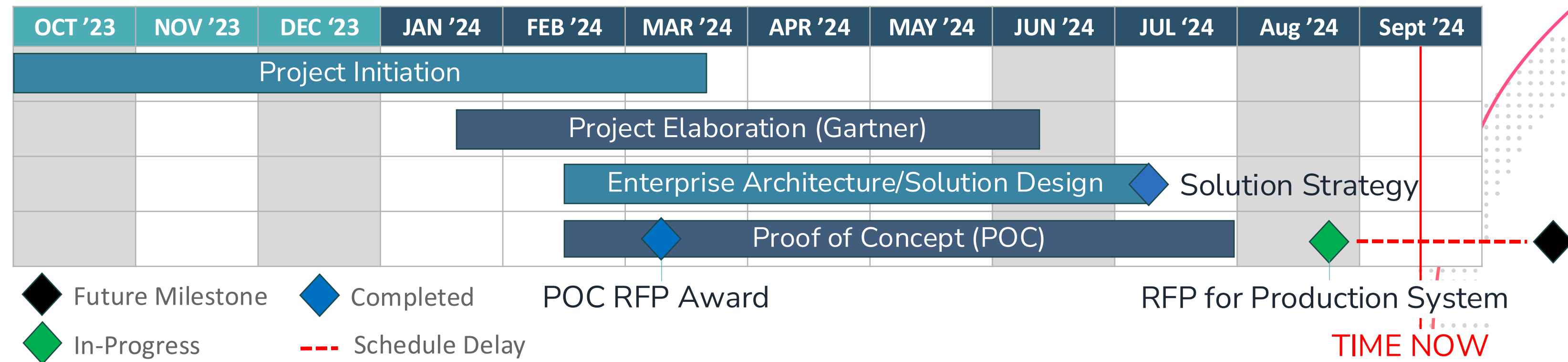
TIME NOW

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Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	9/27/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

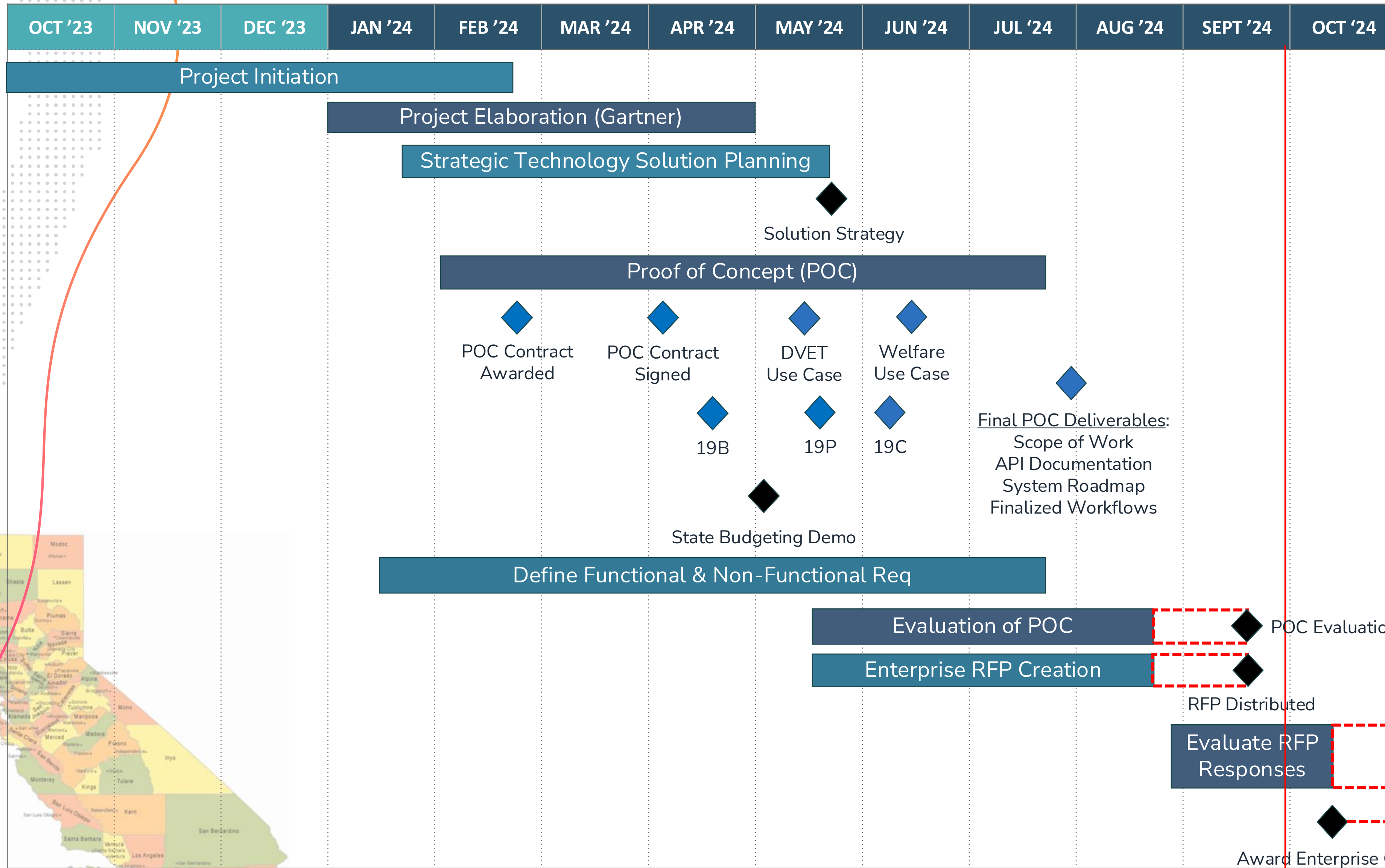
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 9/27/24)	Upcoming Activities
Continued work on the draft Exemptions POC Evaluation Final Report – Gathering artifacts for POC Objectives – Testing The Software, The Vendor/Market and Our Team.	Provide input on the development of the JPA’s long-term strategy and short-term new project determination.
Extensive work completed on the Exemptions and Prop19 promotional video. 1 st cut was due out this week, we had an unforeseen delay and expect it out early next week.	Facilitate project functional and non-functional requirement elaboration to aid in creation of the Enterprise Request for Proposal (RFP)
Presented finalized Payment Milestone artifacts awaiting final signatures for closeout.	Complete development of 5 to 8 minute “promotional” video with JPA and Project Vision; including demonstrations of POC applications.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration

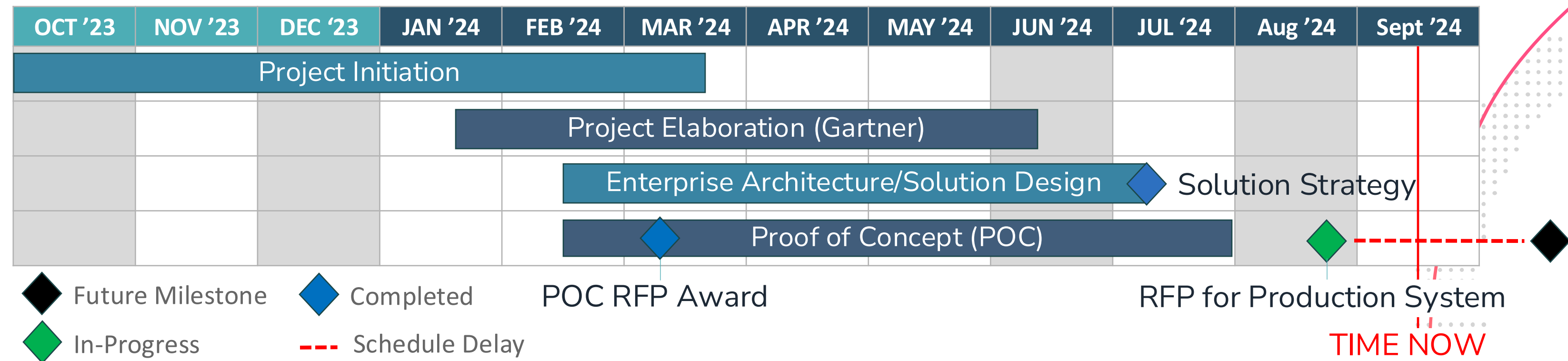
Activities On Hold

TIME NOW



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	9/20/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

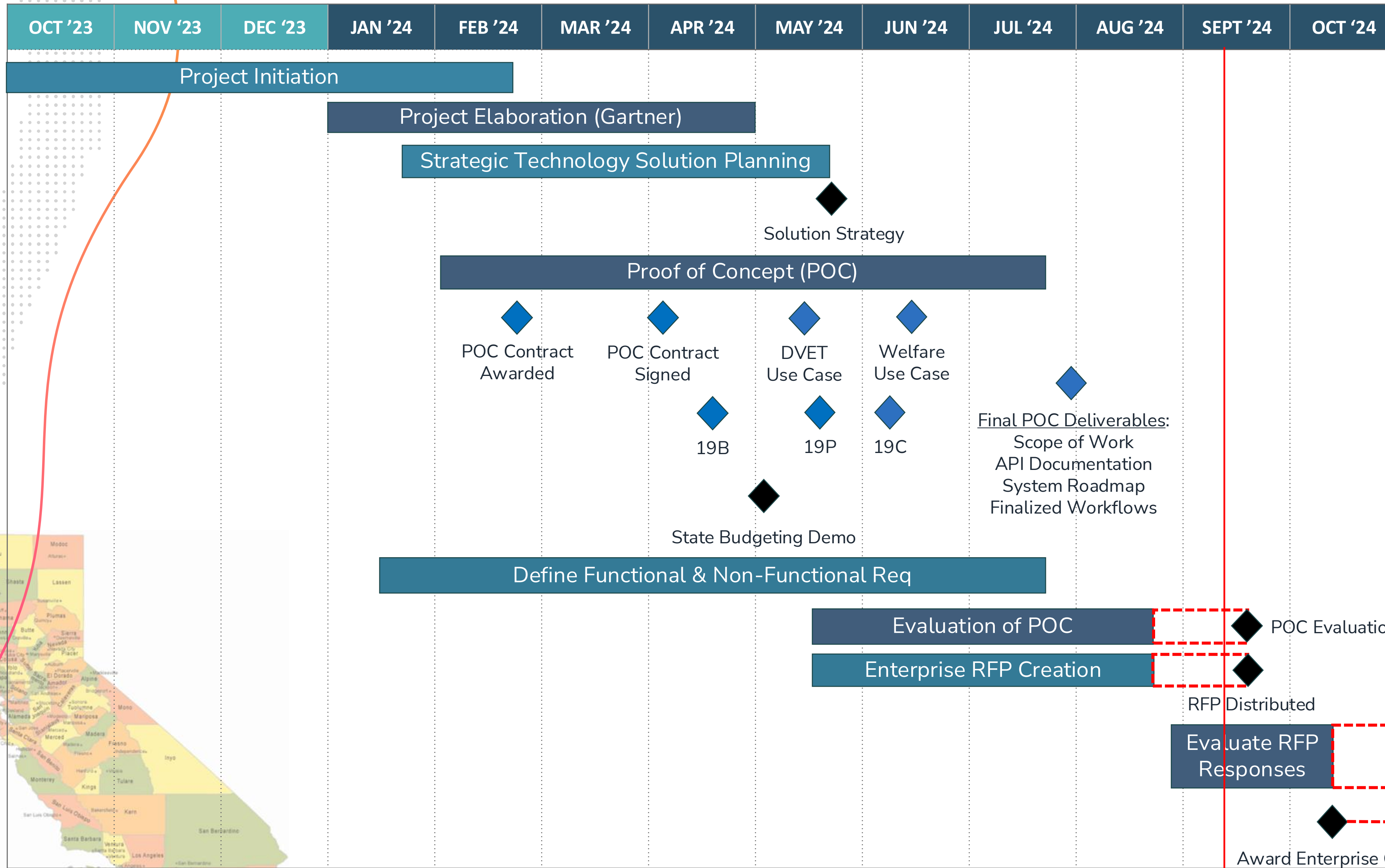
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 9/20/24)	Upcoming Activities
Continued work on the draft Exemptions POC Evaluation Final Report – Gathering artifacts for POC Objectives – Testing The Software, The Vendor/Market and Our Team.	Provide input on the development of the JPA’s long-term strategy and short-term new project determination.
Extensive work completed on the Exemptions and Prop19 promotional video. 1 st cut due out next week.	Facilitate project functional and non-functional requirement elaboration to aid in creation of the Enterprise Request for Proposal (RFP)
Presented finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.	Develop 5 to 8 minute “promotional” video with JPA and Project Vision; including demonstrations of POC applications.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



Milestone Legend

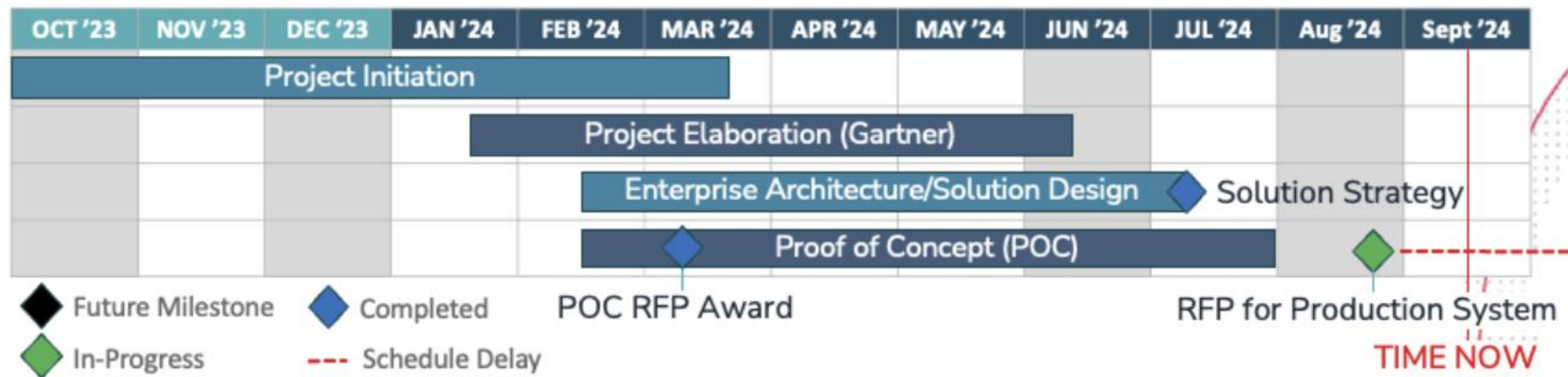
- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration

Activities On Hold



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	9/13/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

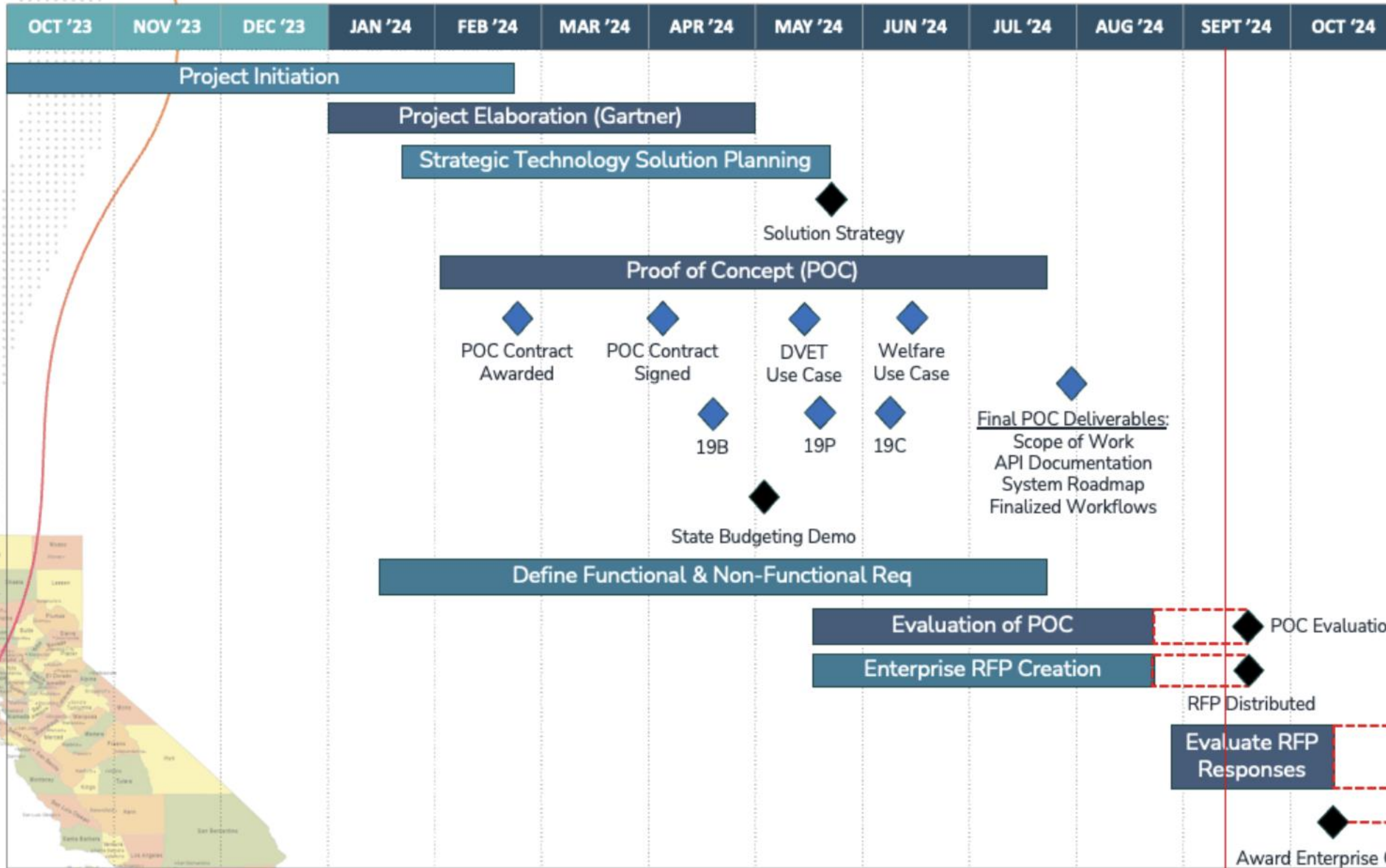
Activities this Week (through 9/13/24) | Upcoming Activities

<p>Completed technical review of Milestone 5 deliverables. All that remains is sign-off of artifacts by Committee and JPA leadership.</p>	<p>Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.</p>
<p>Continued work on the draft Exemptions POC Evaluation Final Report – Gathering test results for POC Objectives – Testing The Software, The Vendor/Market and Our Team.</p>	<p>Provide input on the development of the JPA’s long-term strategy and short-term new project determination.</p>
<p>Met with David Yeung, BOE Deputy Director to establish regular communication channel providing project details, gathering input and gaining consensus.</p>	<p>Facilitate project functional and non-functional requirement elaboration to aid in creation of the Enterprise Request for Proposal (RFP)</p>
<p>Received catalog of Exemptions and Prop19 demonstrations from Just Appraised for promotional video.</p>	<p>Develop 5 to 8 minute “promotional” video with JPA and Project Vision; including demonstrations of POC applications.</p>

Risks	Mitigation Plan	Action Needed



High-Level Project Schedule



Milestone Legend

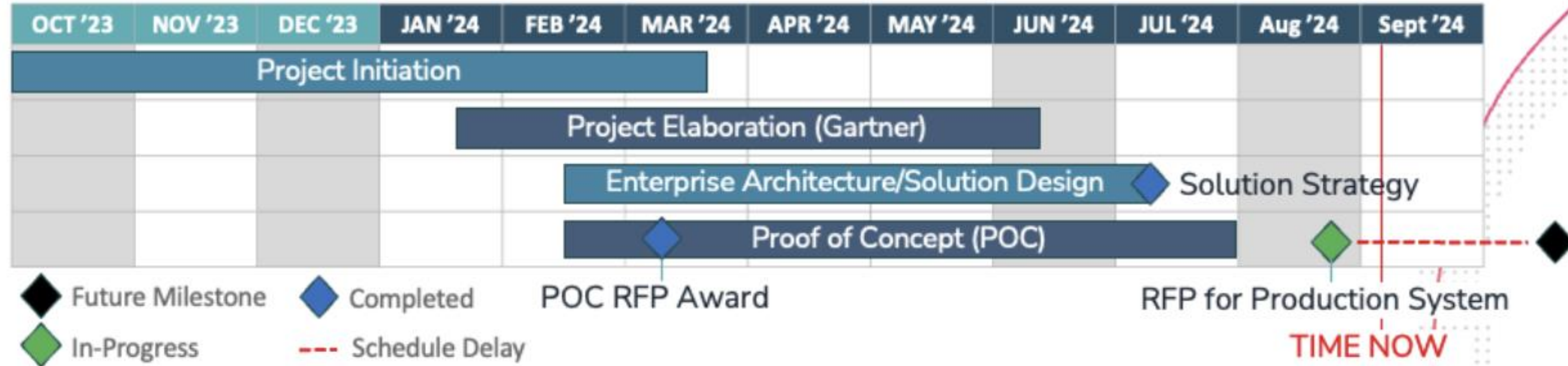
- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration

Activities On Hold



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	9/6/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

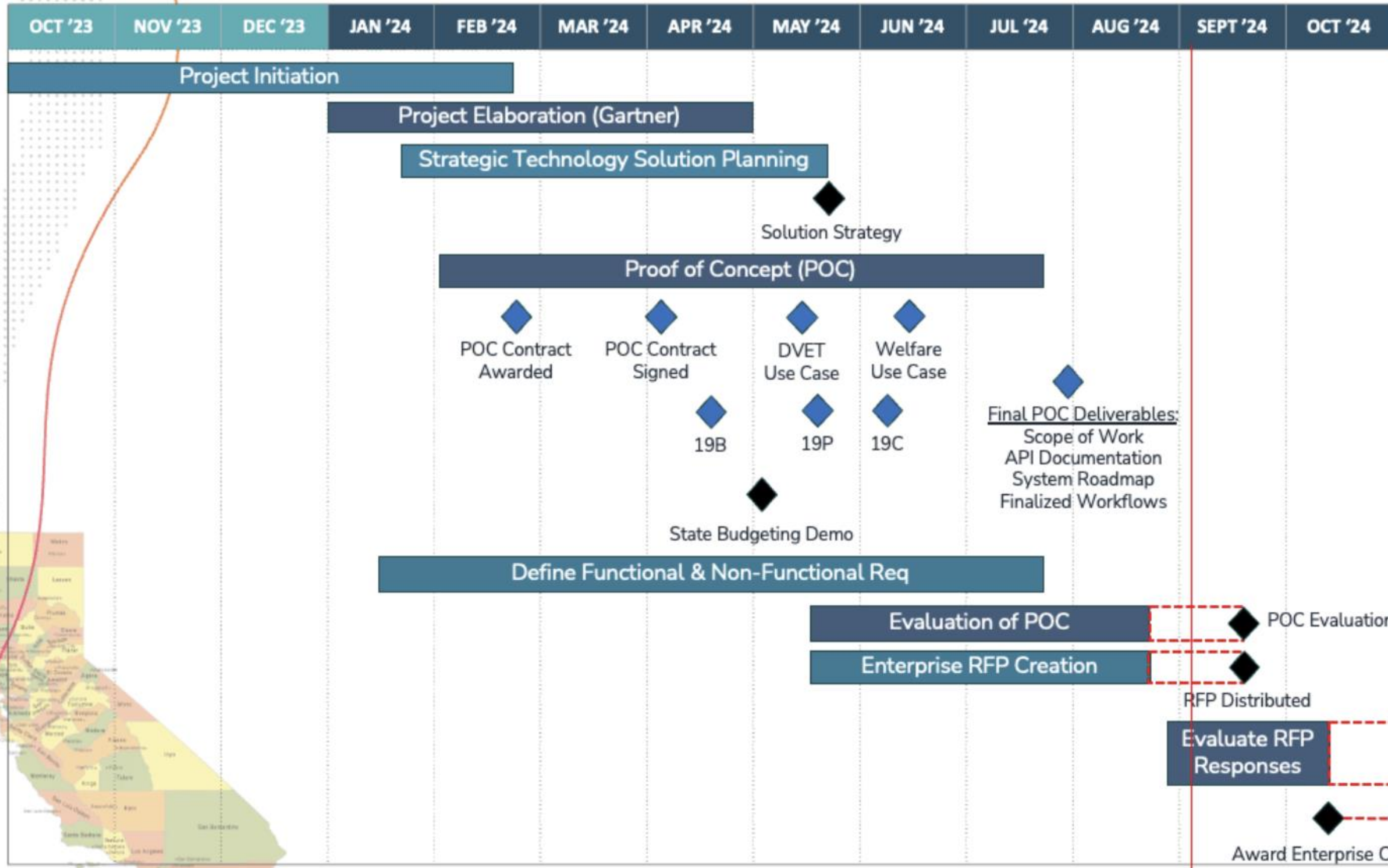
Activities this Week (through 9/6/24) | Upcoming Activities

Completed technical review of Milestone 5 deliverables. All that remains is sign off of artifacts by Committee and JPA leadership.	Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Continued work on the draft Exemptions POC Evaluation Final Report – Gathering test results for POC Objectives – Testing The Software, The Vendor/Market and Our Team	Provide input on the development of the JPA’s long-term strategy and short-term new project determination.
Continued iterations on the IT Prospectus.	Develop 5 to 8 minute “promotional” video with JPA and Project Vision; including demonstrations of POC applications
Set up meeting with David Yeung, BOE Deputy Director, and other BOE staff to establish regular communication channel providing project details, gathering input and gaining consensus	Facilitate project functional and non-functional requirement elaboration to aid in creation of the Enterprise Request for Proposal (RFP)

Risks | Mitigation Plan | Action Needed

Risks	Mitigation Plan	Action Needed

High-Level Project Schedule



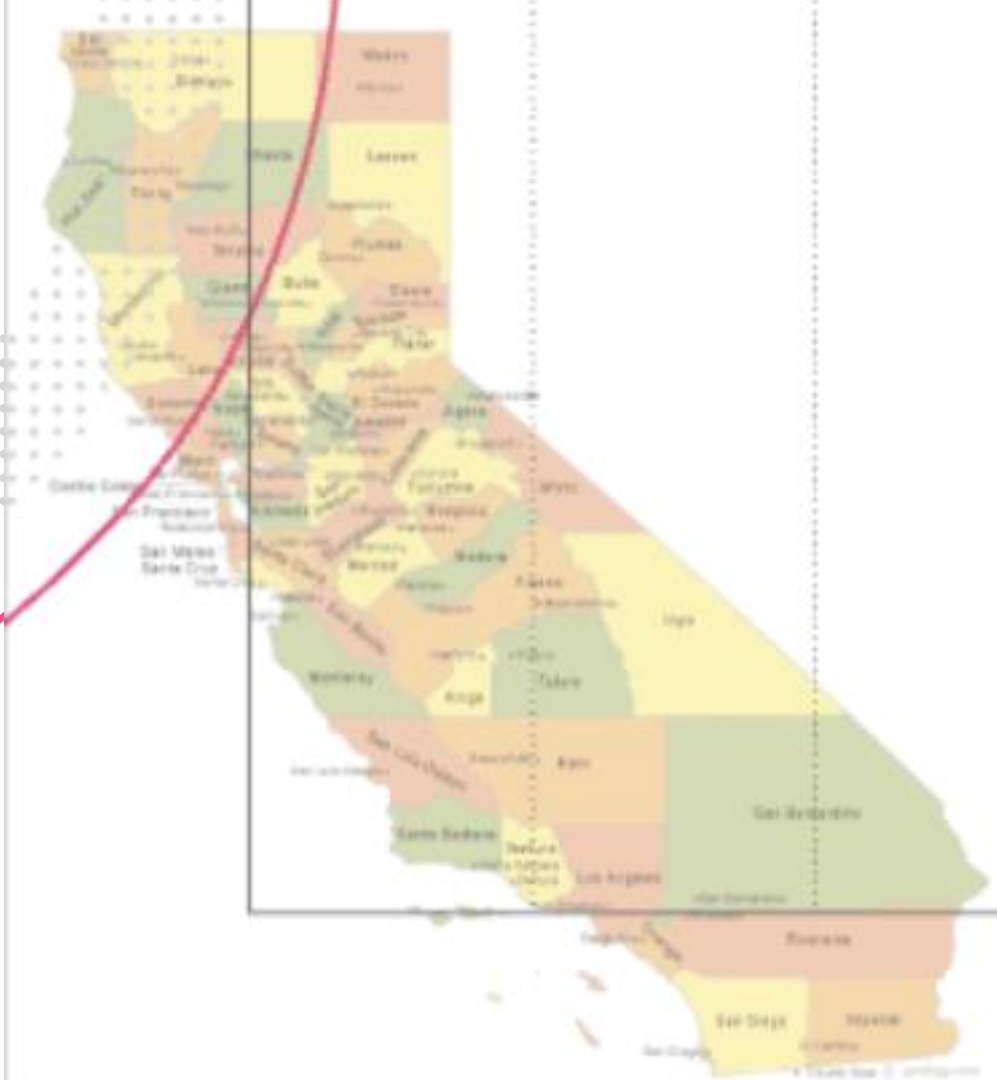
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration

Activities On Hold

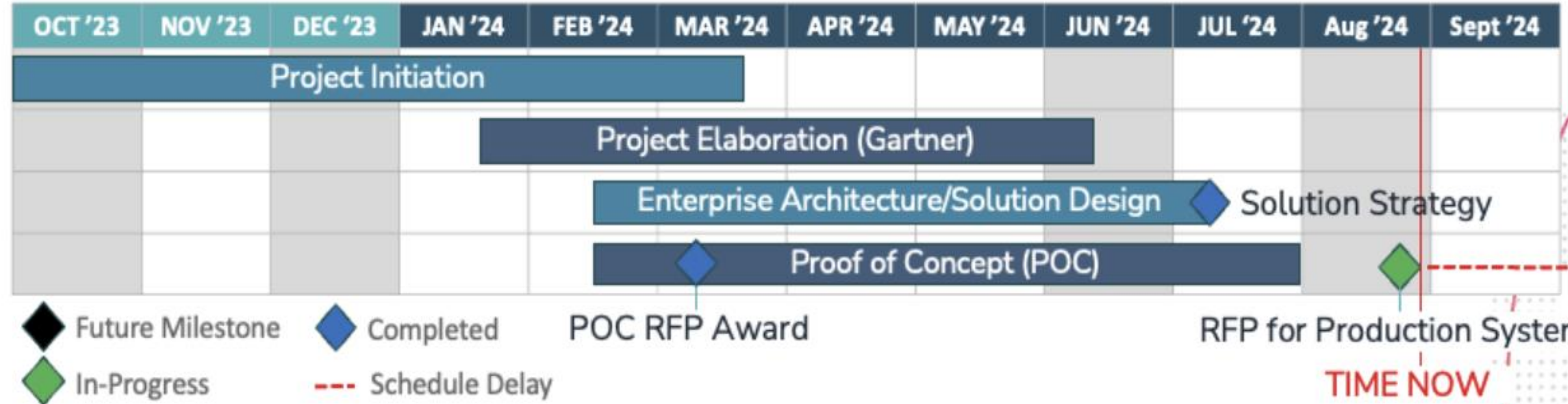
TIME NOW

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Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	8/30/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 8/30/24)

Continued review of Milestone 5 technical deliverables; Scope of Work, Workflows and the Proposed Roadmap have been accepted by the POC Counties (Alameda and El Dorado).

Built out draft of POC Evaluation Exemptions Report – Gathering test results for POC Objectives – Testing The Software, The Vendor/Market and Our Team

Continued iterations on the IT Prospectus.

Upcoming Activities

Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.

Provide input on the development of the JPA’s long-term strategy and short-term new project determination.

Establish regular communication channel to provide project details David Yeung, BOE Deputy Director, and other BOE staff.

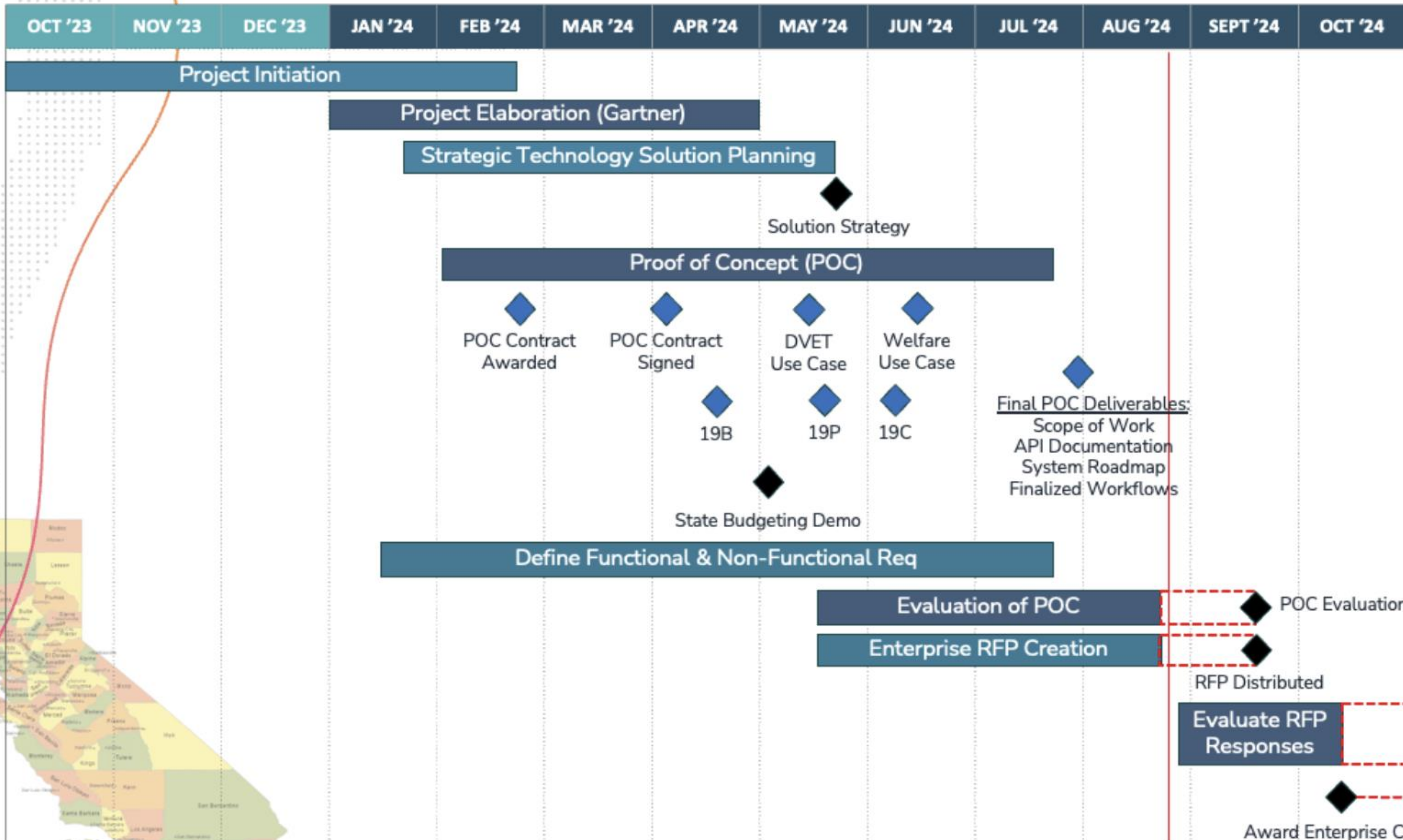
Risks Mitigation Plan

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Action Needed

Continue Just Appraised demonstrations during weekly or bi-weekly sessions.	
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High-Level Project Schedule



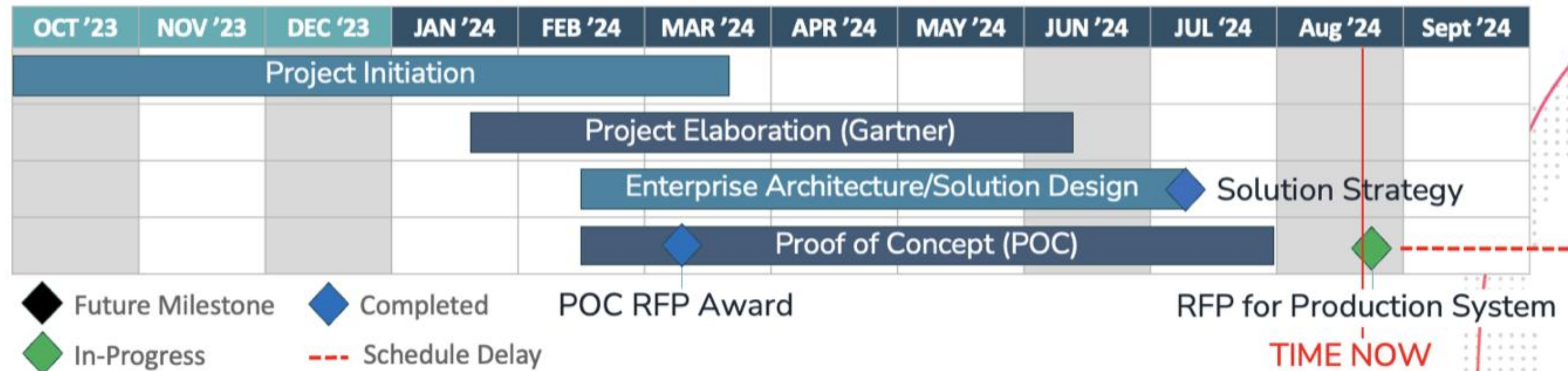
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	8/23/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

- Green:** The project is on track per the approved scope, schedule and budget specifications.
- Yellow:** The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- Red:** The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

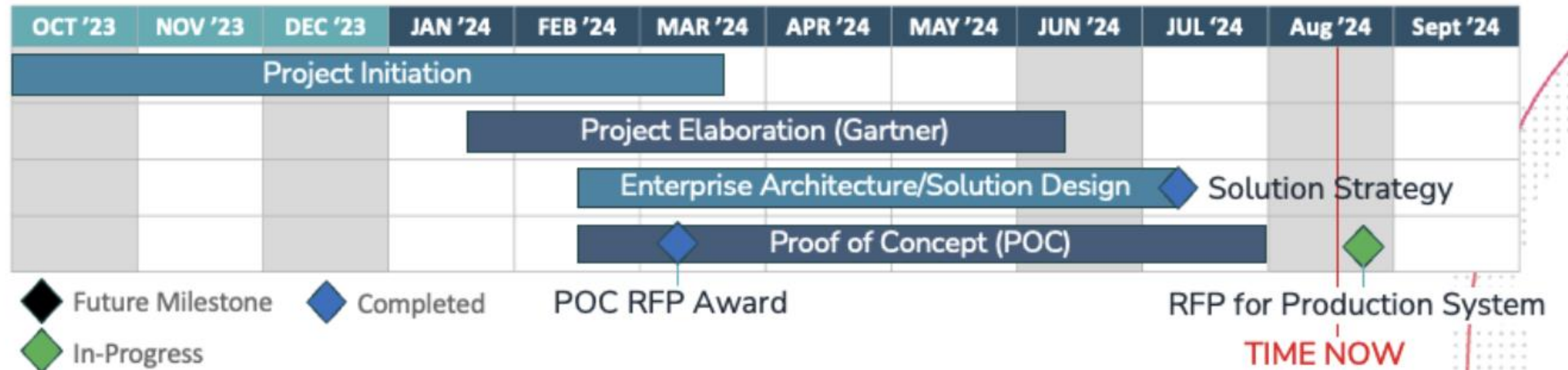
Activities this Week (through 8/23/24)	Upcoming Activities
Completed 4 th Constituent testing session. In this session we had a claimant from a Church/Religious institution switching to a Welfare exemption. Feedback is being gathered and will be distributed.	Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Continued review of Milestone 5 technical deliverables; Scope of Work, Workflows and the Proposed Roadmap have been accepted by the POC Counties (Alameda and El Dorado).	Provide input on the development of the JPA's long-term strategy and short-term new project determination.
Continued iterations on the POC Evaluation Framework and IT Prospects.	Establish regular communication channel to provide project details David Yeung, BOE Deputy Director, and other BOE staff.

Risks	Mitigation Plan

Action Needed
Continue Just Appraised demonstrations during weekly or bi-weekly sessions.

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	8/16/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 8/16/24)

Completed 3rd Constituent testing session, this time with a Welfare Housing organization. Feedback is being gathered and will be distributed. Next testing session scheduled for 8/20.

Received comment on Milestone 5 deliverables; Scope of Work, Proposed Roadmap and Consolidated API Documentation.

Continued iterations on the POC Evaluation Framework and IT Prospects.

Upcoming Activities

Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.

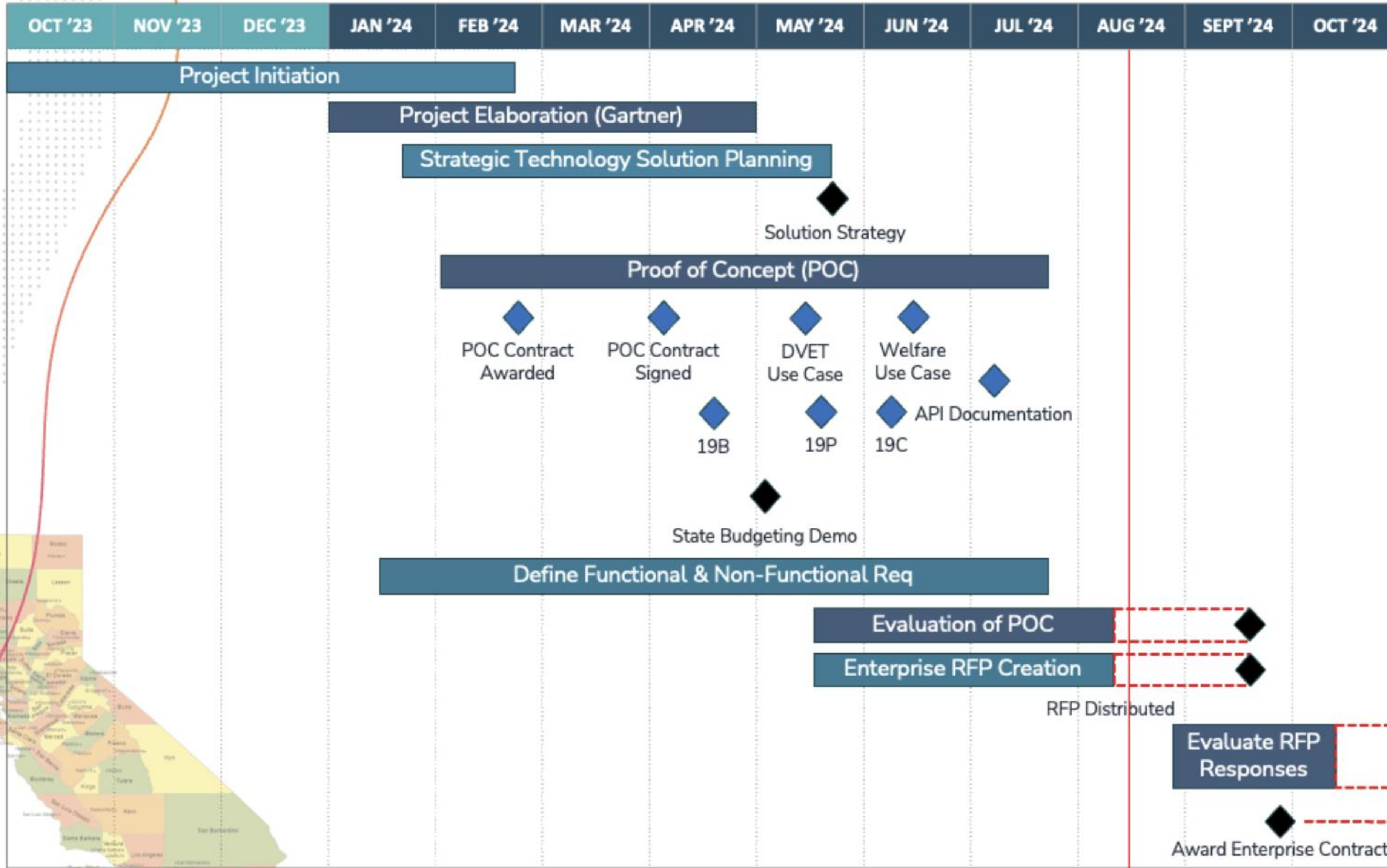
Provide input on the development of the JPA's long-term strategy and short-term new project determination.

Establish regular communication channel to provide project details David Yeung, BOE Deputy Director, and other BOE staff.

Risks	Mitigation Plan

Action Needed
Continue Just Appraised demonstrations during weekly or bi-weekly sessions.

High-Level Project Schedule



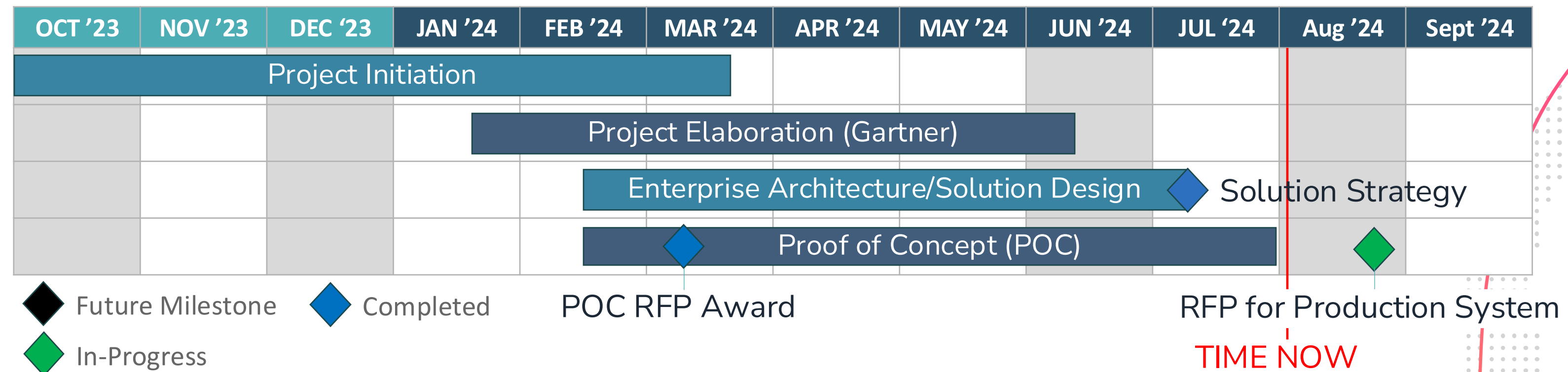
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done
- Unknown Extended Duration



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	8/9/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

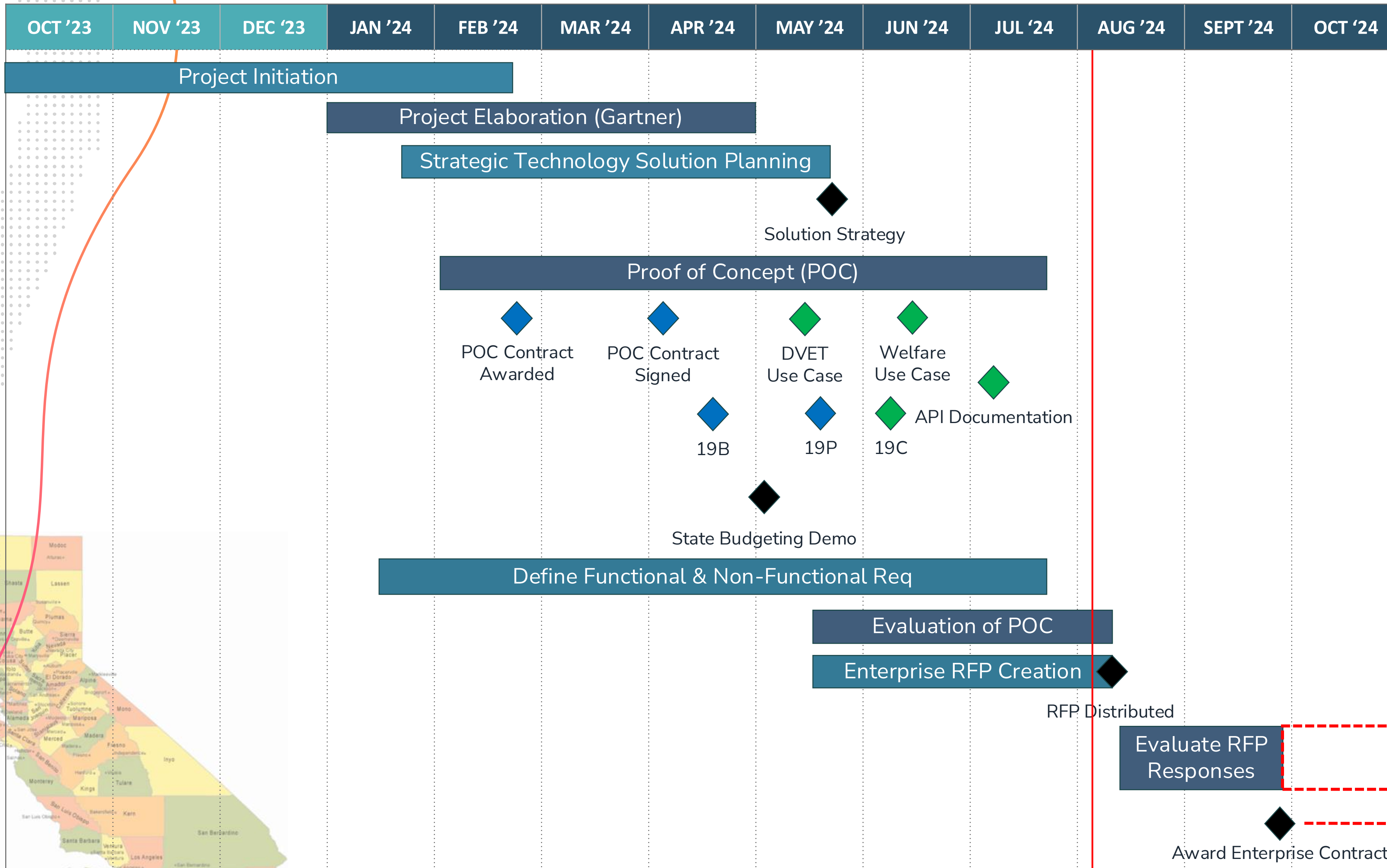
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 8/9/24)	Upcoming Activities
Completed 2 nd testing session with DVET constituent outside of County staff. Session was held during the NCAA conference JPA Board meeting.	Present finalized Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Reviewed consolidated feedback from the 1 st constituent testing sessions. Feedback was added to the product backlog and will be addressed in future sprints.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.
Kicked off review and provide comment on Milestone 5 deliverables; Scope of Work, Proposed Roadmap and Consolidated API Documentation.	Establish regular communication channel to provide project details David Yeung, BOE Deputy Director, and other BOE staff.
Continued iterations on the POC Evaluation Framework and IT Prospectus.	

Risks	Mitigation Plan

Action Needed
Continue Just Appraised demonstrations during weekly or bi-weekly sessions.

High-Level Project Schedule



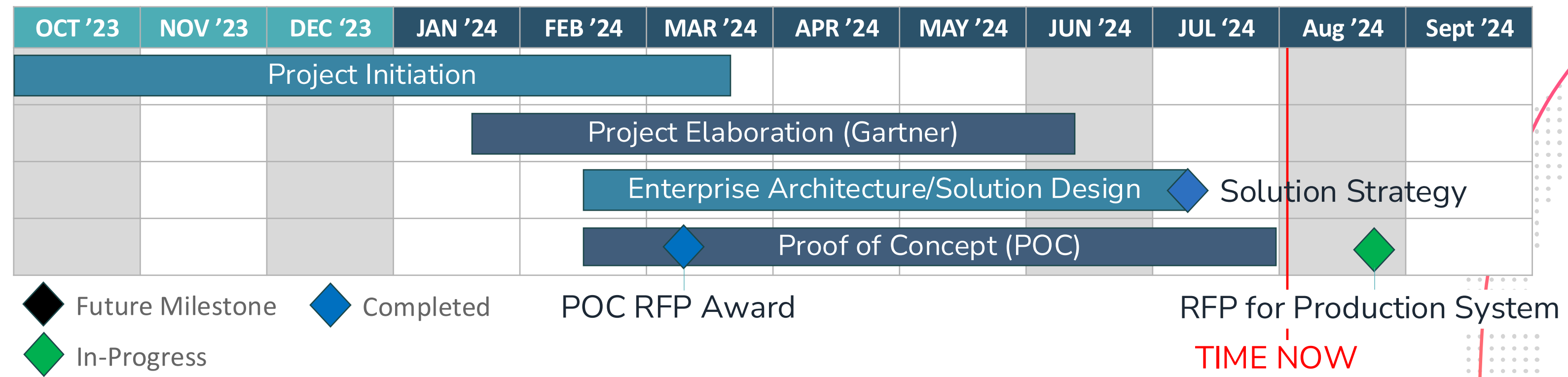
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	8/2/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	
Scope	
Risk	
Trend	

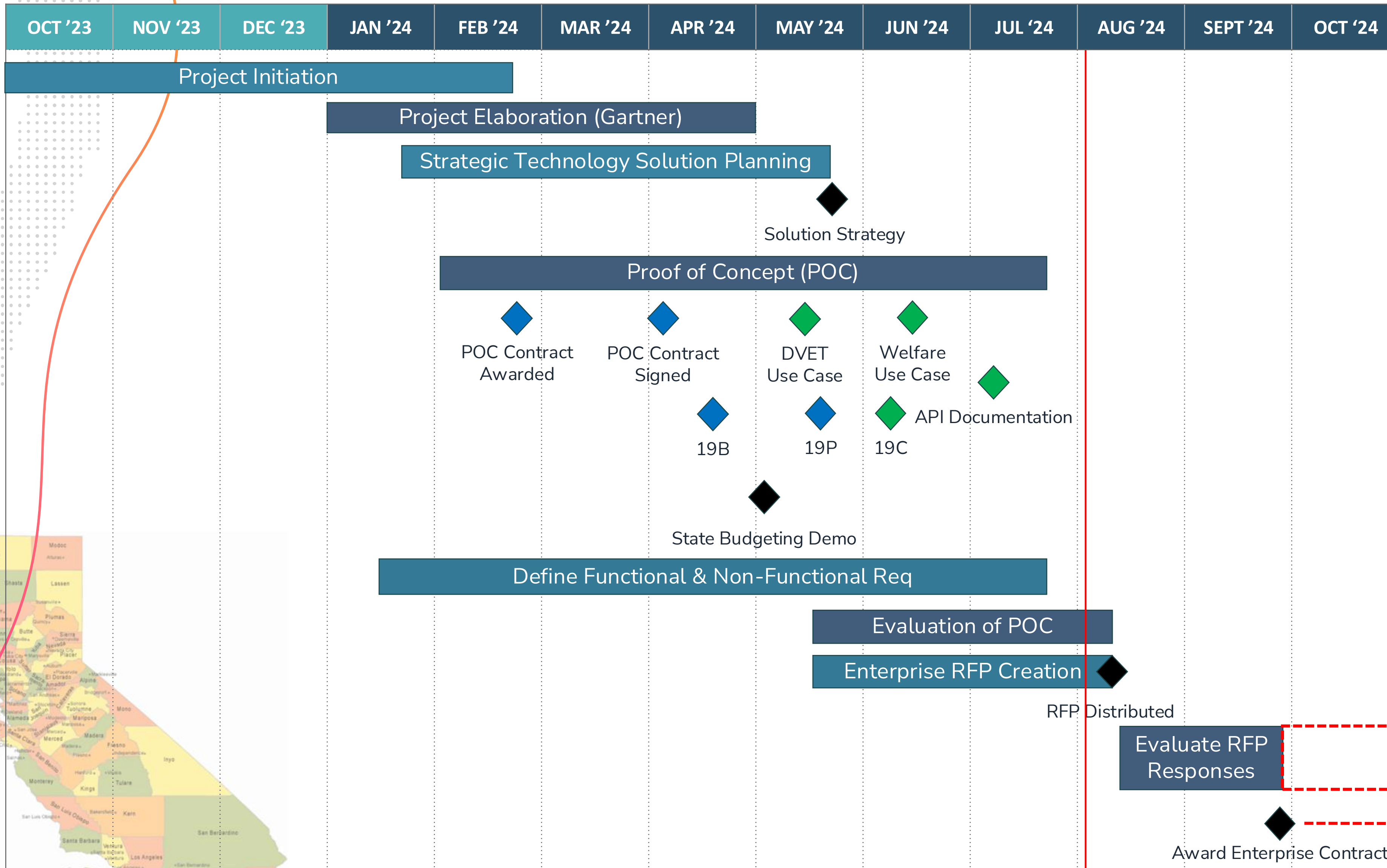
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 8/2/24)	Upcoming Activities
Confirmed 2 nd testing session with a constituent not working with the County. Session will be held during the NCAA conference JPA Board meeting.	Review and provide comment on Milestone 5 deliverables; Scope of Work, Proposed Roadmap and Consolidated API Documentation.
Reviewed consolidated feedback from the 1 st constituent testing sessions. Feedback was added to the product backlog and will be addressed in future sprints.	Present finalized 261-G & 267 Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Met with David Yeung, BOE Deputy Director, to establish communication channel and provide project details.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.
Facilitated final Sprint Showcase and received final deliverables (Milestone 5) with Just Appraised to wrap up POC project.	
Continued iterations on the POC Evaluation Framework and IT Prospectus.	

Risks	Mitigation Plan

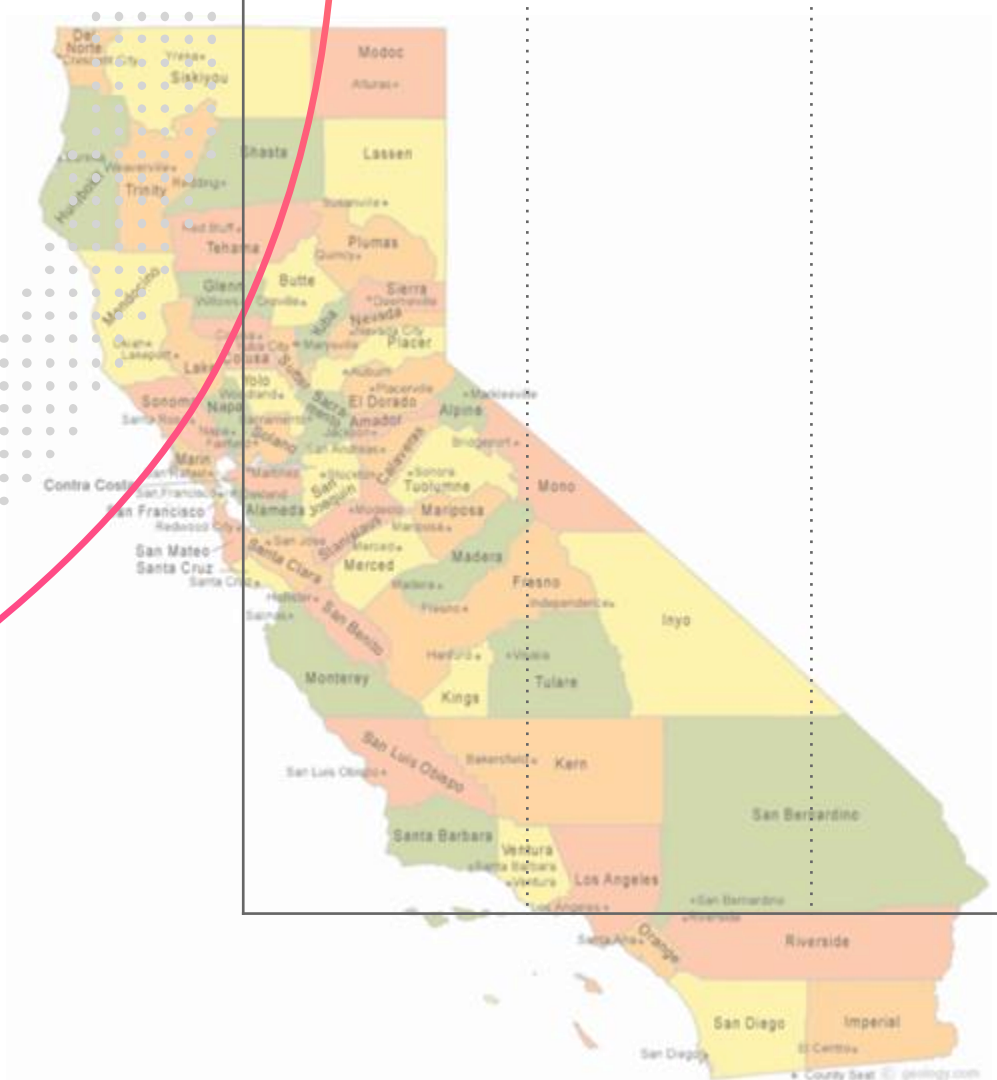
Action Needed
Continue Just Appraised demonstrations during weekly or bi-weekly sessions.

High-Level Project Schedule



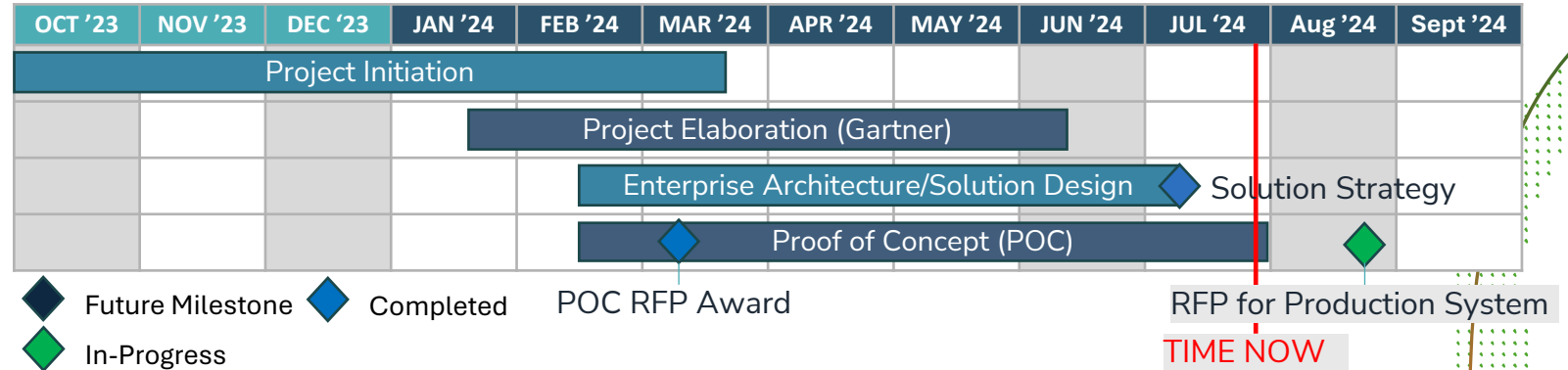
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done



Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	7/26/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow, Yellow, Yellow

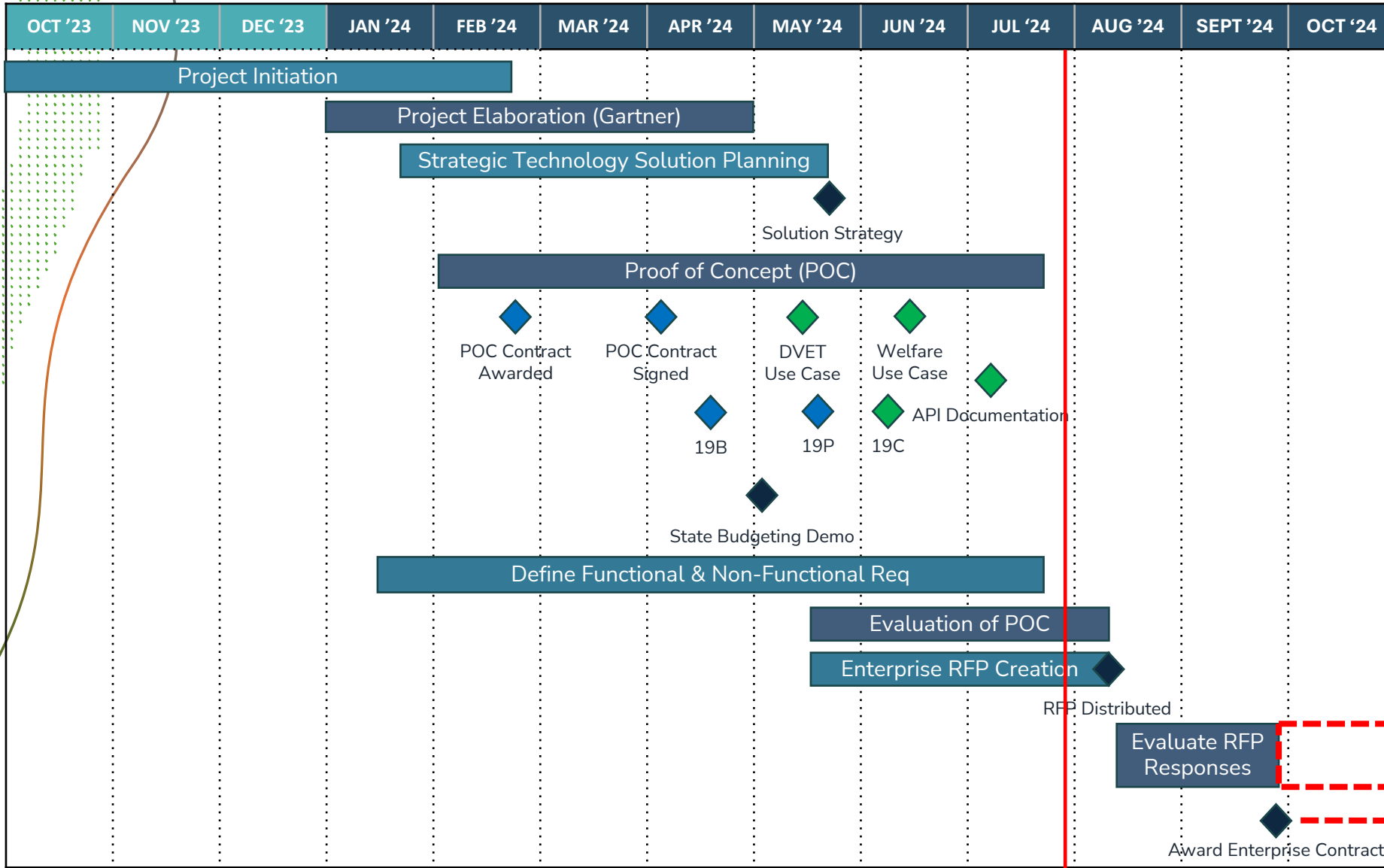
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 7/26/24)	Upcoming Activities
Held first testing session with a constituent not working with the County. The session was successful and will be repeated in August.	Confirm go forward plan for Just Appraised demonstrations after POC officially ends.
Published initial draft of POC Evaluation framework including detailed scoring criteria and stakeholder survey questions.	Meet with David Yeung, BOE Deputy Director, to establish communication channel while providing project details
Initial Enterprise RFP framework released for review by leadership for Exemptions and Prop19 SOWs.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment
Continued iterating on IT Prospectus prior to presentation to Exemptions and JPA leadership.	Provide input on the development of the JPA's long-term strategy and short-term new project determination

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



Milestone Legend

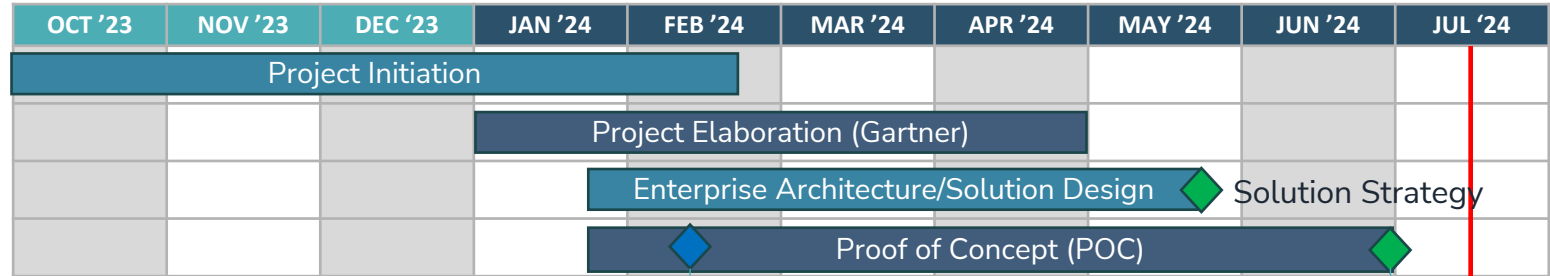
- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

Confidential

TIME NOW

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	7/19/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



◆ Future Milestone
 ◆ Completed
 POC RFP Award
 ◆ In-Progress
 RFP for Production System

TIME NOW

Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow, Yellow, Yellow

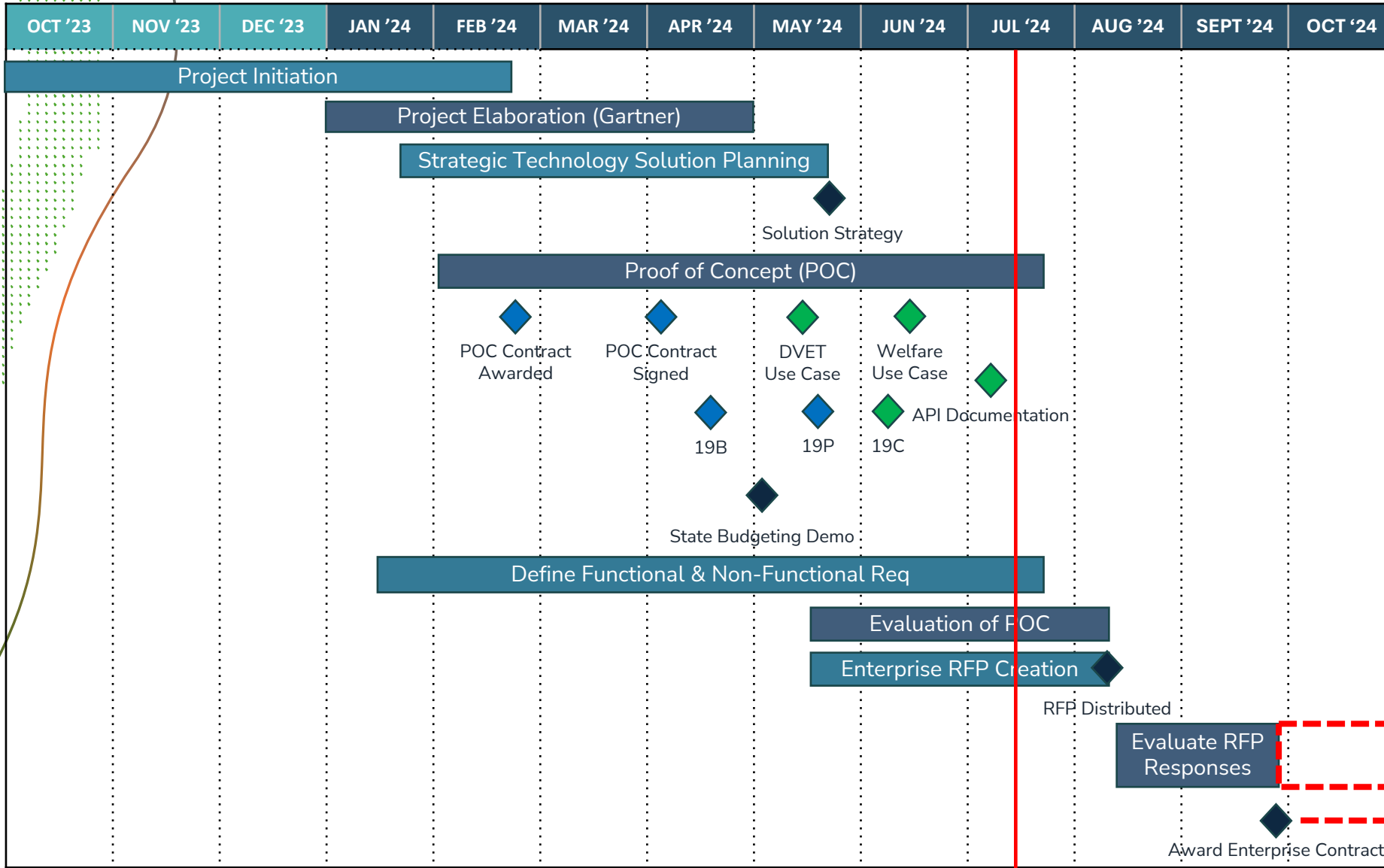
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 7/19/24)	Upcoming Activities
The team facilitated Sprint 8 planning sessions with JA.	Hold Sprint 7 Showcase to demonstrate new features recently delivered for the Welfare use case
Met with project leadership to review initial POC Evaluation framework and developed additional detailed scoring criteria and survey questions.	Meet David Yeung, BOE Deputy Director, to establish communication channel while providing project priorities and update.
Met with project leadership to develop next steps in creation of Enterprise RFP for Exemptions and Prop19 SOWs.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Continued iterating on IT Prospectus prior to presentation to Exemptions and JPA leadership.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



Milestone Legend

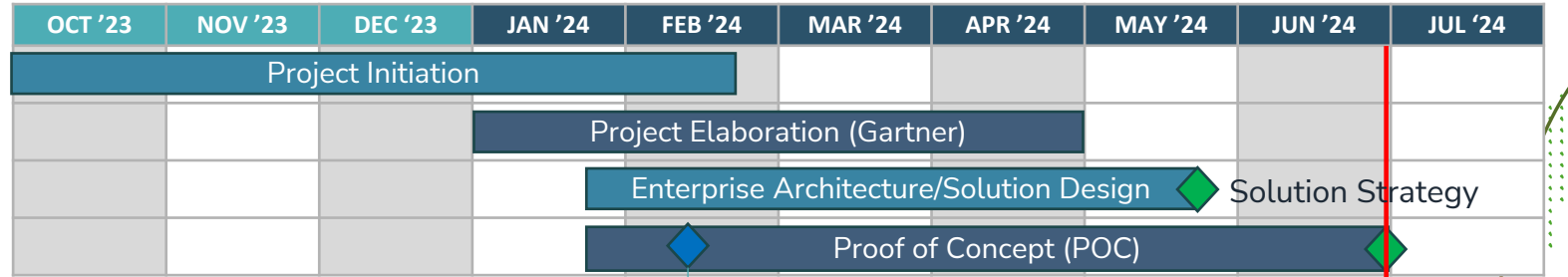
- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

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TIME NOW

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	7/5/2024
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



◆ Future Milestone
 ◆ Completed
 POC RFP Award
 ◆ In-Progress
 RFP for Production System

TIME NOW

Schedule	
Scope	
Risk	
Trend	

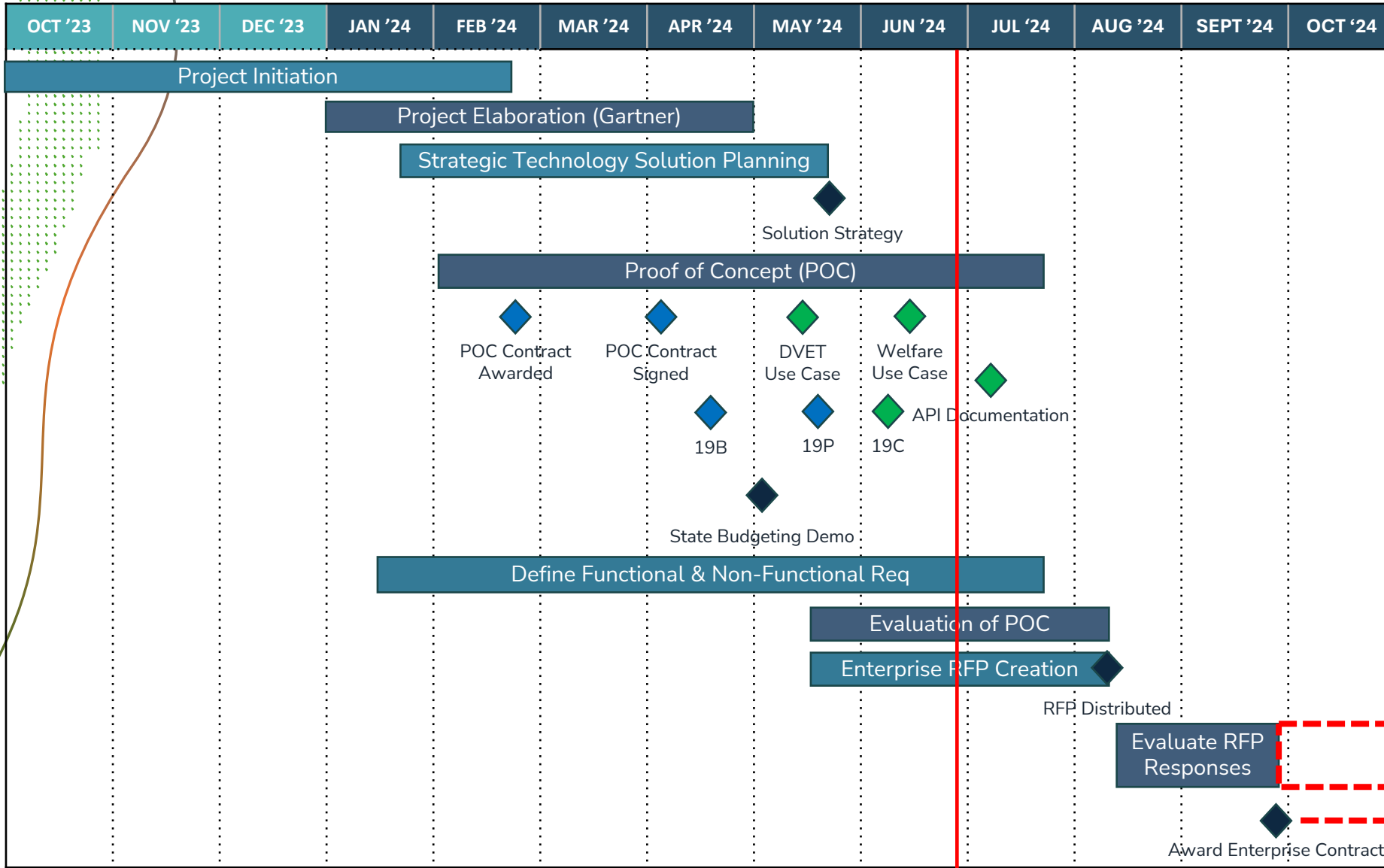
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 7/5/24)	Upcoming Activities
The team facilitated Sprint 6 Software Demonstration Showcase and 7 & 8 Discovery sessions with JA.	Hold Sprint 7 Showcase to demonstrate new features recently delivered for the Welfare use case.
Developed initial POC Evaluation framework with Objective scoring criteria and Stakeholder survey questions.	Meet with David Yeung, BOE Deputy Director, to establish communication channel while providing project priorities and update.
Continued iterating on IT Prospectus prior to presentation to Exemptions leadership.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
	Provide input on the development of the JPA's long-term strategy and short-term new project determination.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



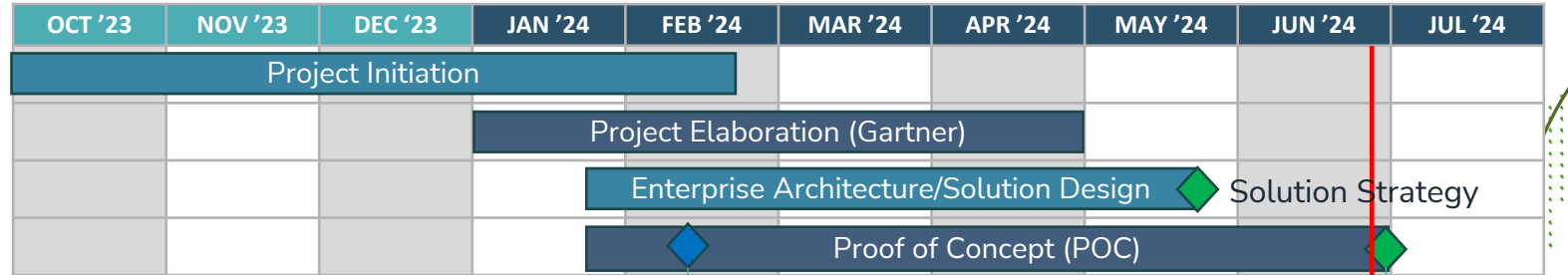
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

Confidential
TIME NOW

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	6/21/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



◆ Future Milestone ◆ Completed POC RFP Award ◆ In-Progress RFP for Production System
◆ In-Progress | TIME NOW

Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow, Yellow, Yellow

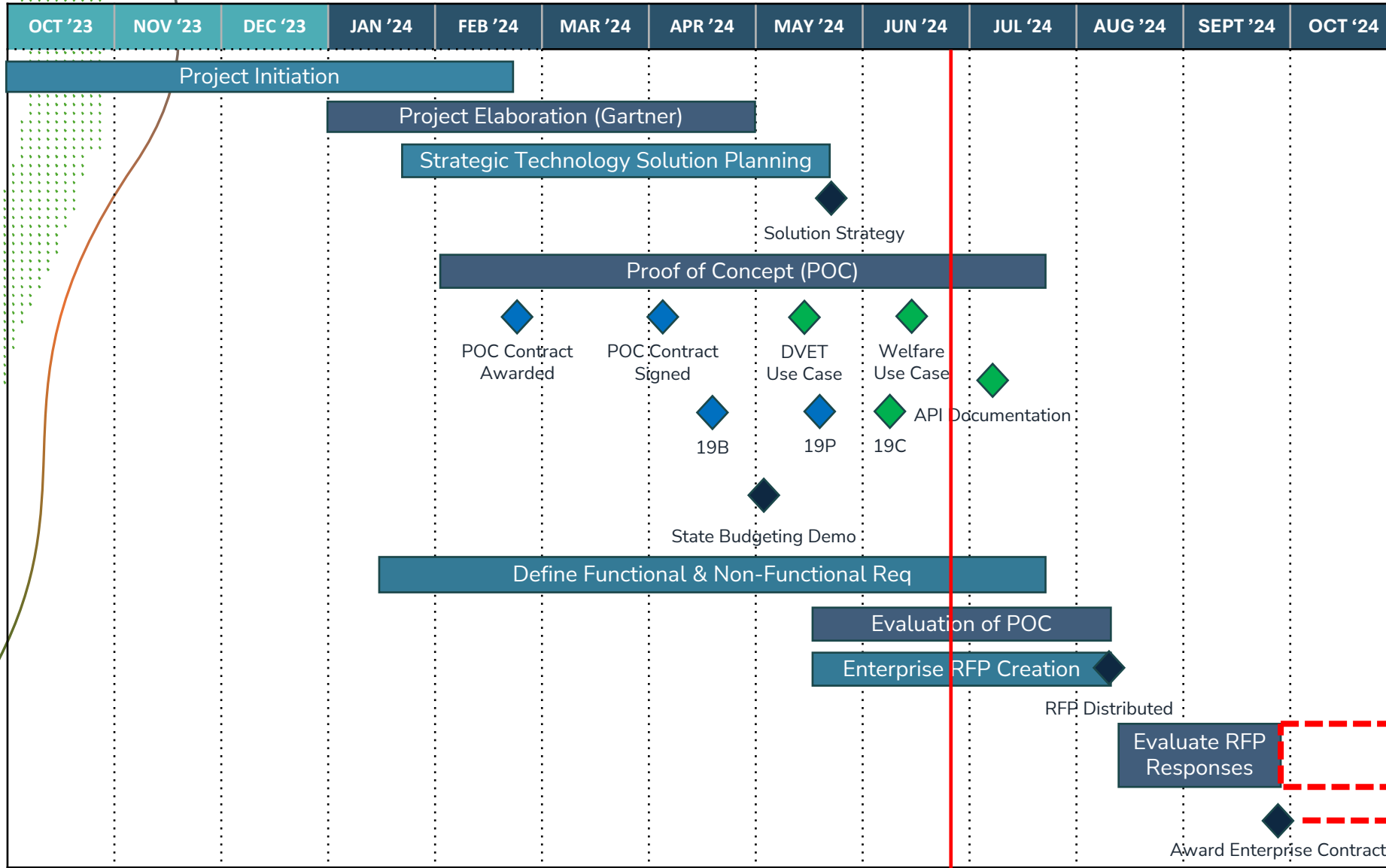
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 6/21/24)	Upcoming Activities
Completed Sprint 5 with a showcase consisting of a demonstration of new features, metrics reporting & and Sprint 6 goals.	Hold Sprint 6 Showcase to demonstrate new features recently delivered for the Welfare use case.
The team facilitated Sprint 6, 7 & 8 Planning sessions with JA.	Meet with David Yeung, BOE Deputy Director, to establish communication channel while providing project priorities and update.
Held Enterprise Planning/Forecasting review of input JA developed. This included a listing of known scope, POC accomplishments w/ metrics, implementation strategy among other aspects.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Completed IT Prospectus Quality Assurance Plan and Training Plan. Made great progress developing framework for implementation strategy and estimation inputs to schedule. This framework will be updated with Vendor input.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



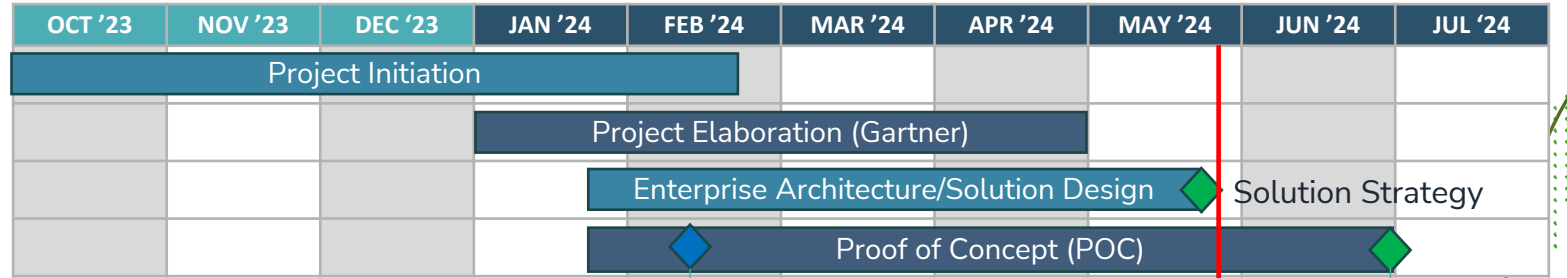
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

Confidential
TIME NOW

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	6/14/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



◆ Future Milestone
 ◆ Completed
 POC RFP Award
 ◆ In-Progress
 RFP for Production System
TIME NOW

Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow, Yellow, Yellow

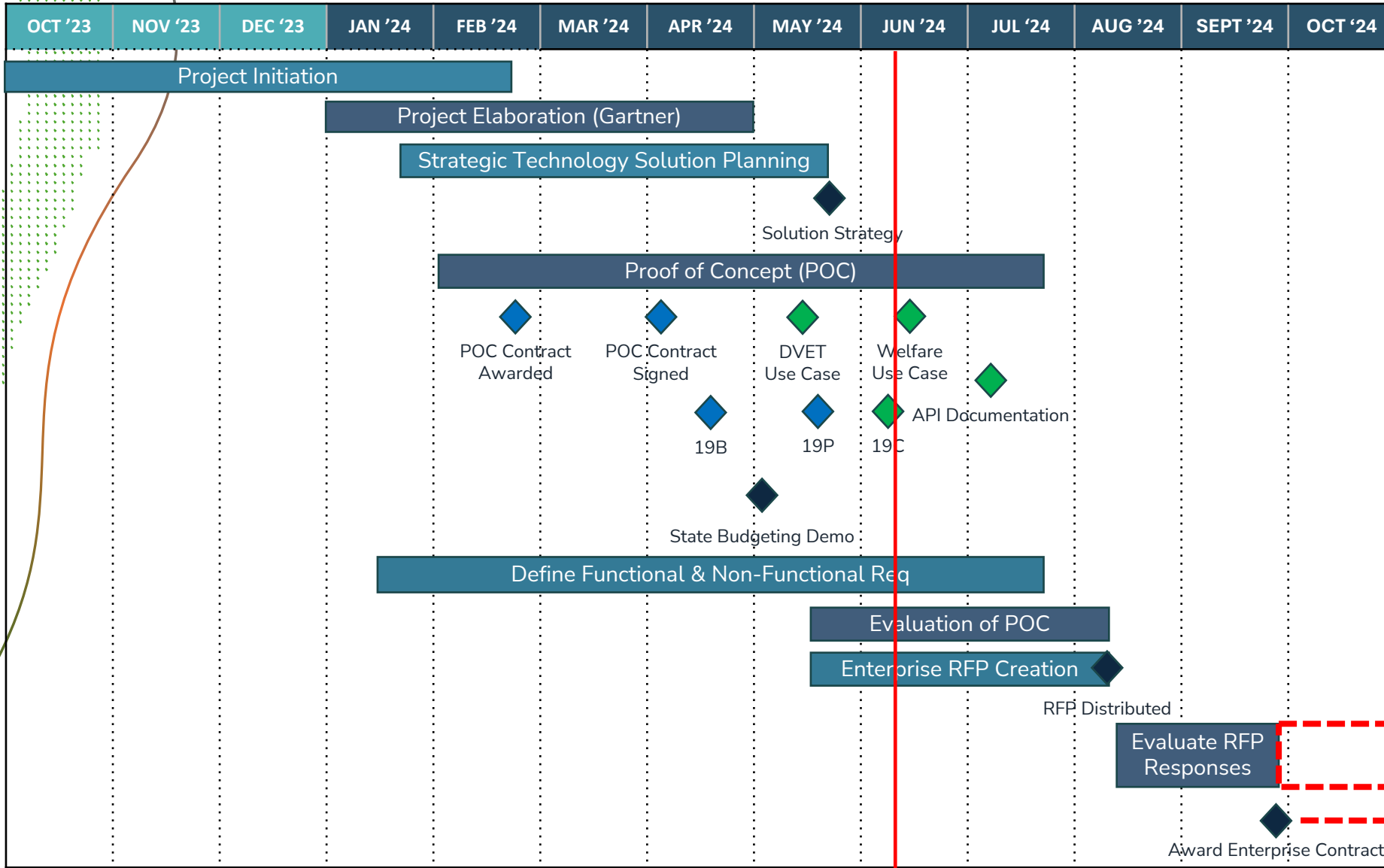
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- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 6/14/24)	Upcoming Activities
The team facilitated Sprint 5, 6, 7 & 8 Planning sessions with JA, including deep dive discovery sessions on Scheduling and Managing Field Inspections and API Integration.	Hold Sprint 5 Showcase to demonstrate new features recently delivered for the Welfare use case.
Facilitated meeting with JA to make them aware of our approach to engaging and keeping BOE aware of JPA projects.	Met with David Yeung, BOE Deputy Director, to establish communication channel while providing project priorities and update.
Received final approval from POC Counties on final deliverables associated with the 261-G use case.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof-of-Concept Counties before gaining final approval to move forward with payment.
Detailed Project Objectives, Goals and developed estimation framework for determining scope and schedule for inclusion in Exemptions IT Prospectus.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



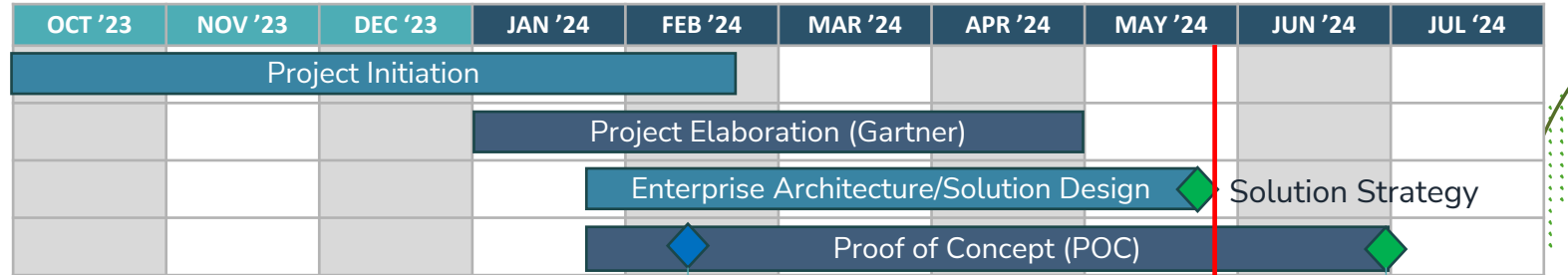
Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

Confidential
TIME NOW

Project Management Dashboard

Project Name	JPA Exemptions
Project Manager	Matt Kissinger
Status Date	6/7/24
Project Description	Creation of a System to streamline Exemptions processing across all 58 California Counties.



◆ Future Milestone
 ◆ Completed
 POC RFP Award
 ◆ In-Progress
 RFP for Production System
| TIME NOW

Schedule	Yellow
Scope	Green
Risk	Green
Trend	Yellow

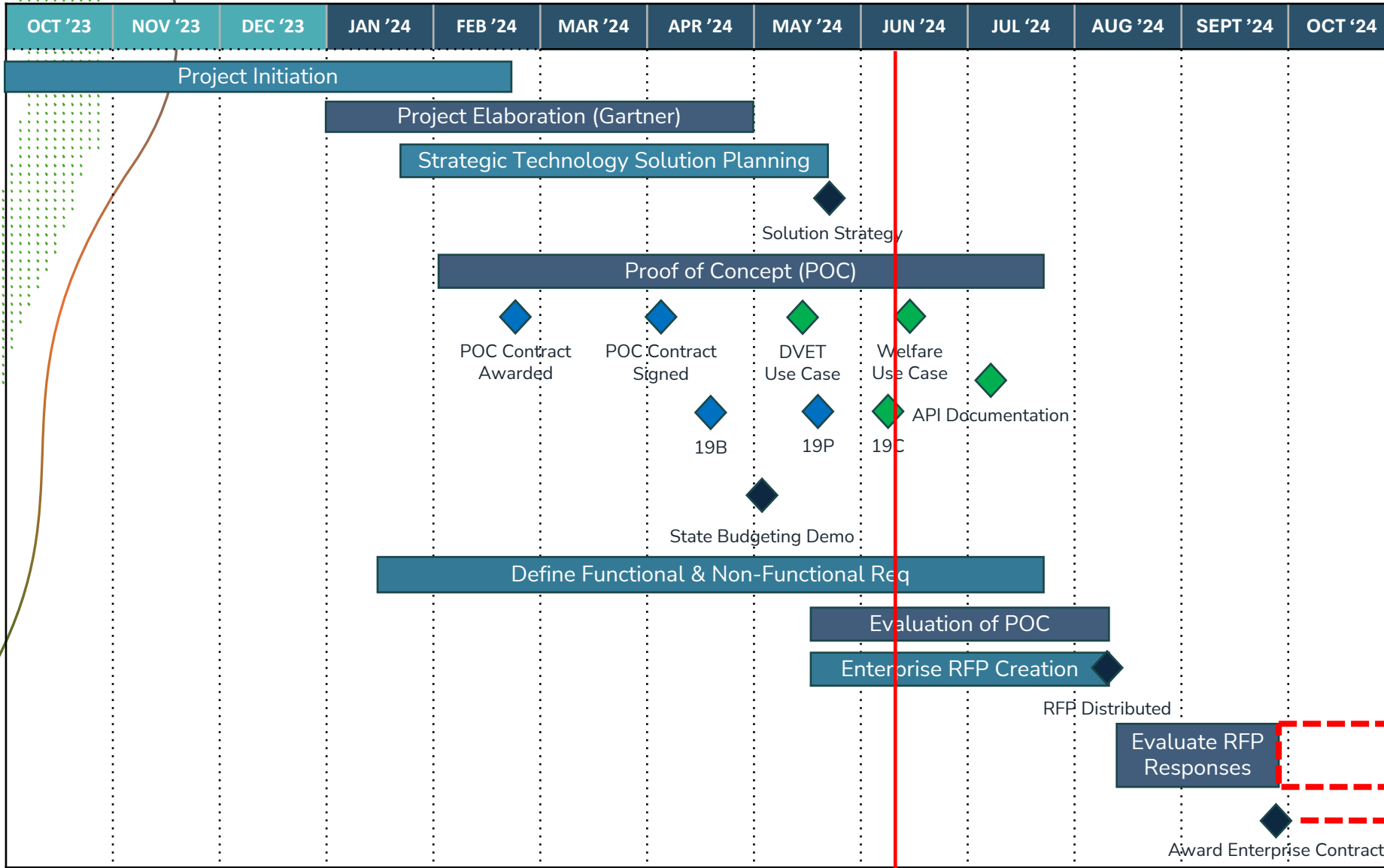
- The project is on track per the approved scope, schedule and budget specifications.
- The project is experiencing challenges, but is still expected to substantially meet all of the scope, schedule and budget specifications.
- The project is at risk of scope, schedule and budget specifications changing or of not substantially meeting the business objectives established in the contract.

Activities this Week (through 6/7/24)	Upcoming Activities
The team facilitated Sprint 4 Showcase with Just Appraised where they demonstrated new features in the system and sprint metrics, see subsequent slide.	Present finalized 261-G DVET Payment Milestone artifacts reviewed and accepted by Proof of Concept Counties before gaining final approval to move forward with payment.
Facilitated meeting with El Dorado to finalize Form 261-G testing, Alameda County PO, Israel Padilla, has approved already.	Provide input on the development of the JPA's long-term strategy and short-term new project determination.
Met with Alameda and El Dorado counties to further detail our approach to engaging and keeping BOE aware of JPA projects.	Schedule meeting with David Yeung, BOE Deputy Director, to establish communication channel and initiative priorities and update.
Met with JA and El Dorado County to receive Megabyte system demonstration to aid in creation of API Documentation deliverable.	Complete first draft of Exemptions IT Prospectus.
Outline of Exemptions IT Prospectus is complete and development continues.	

Risks	Mitigation Plan

Action Needed

High-Level Project Schedule



Milestone Legend

- ◆ Future Milestone
- ◆ In-Progress
- ◆ Done

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