



# SHIRLEY N. WEBER, Ph.D.

CALIFORNIA SECRETARY OF STATE

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October 14, 2022

The Honorable Nancy Skinner Chair  
Joint Legislative Budget Committee  
State Capitol, Room 553  
Sacramento, CA 95814

The Honorable Phil Ting, Vice Chair  
Joint Legislative Budget Committee  
State Capitol, Room 553  
Sacramento, CA 95814

The Honorable Anthony J. Portantino, Chair  
Senate Appropriations Committee  
State Capitol, Room 2206  
Sacramento, CA 95814

The Honorable Chris R. Holden, Chair  
Assembly Appropriations Committee  
1021 O Street, Suite 8220  
Sacramento, California 95814

Dear Chairpersons Skinner, Ting, Portantino, and Holden:

Attached is the Secretary of State's quarterly status report on the progress of the CAL-ACCESS Replacement System Project, in accordance with Government Code section 84602(c). Previous reports are posted on the Secretary of State's office website at [www.sos.ca.gov/administration/agency-reports/cal-access-replacement-project-cars-agency-reports](http://www.sos.ca.gov/administration/agency-reports/cal-access-replacement-project-cars-agency-reports). If you have any questions about this report, please feel free to contact Margie Hieter, Acting Division Chief, Political Reform Division, at (916) 517-8609 or Erric Garris, Deputy Secretary of State, Legislative Affairs, at (916) 695-1686.

Sincerely,

Shirley N. Weber, Ph.D.  
Secretary of State

Attachment

## **Introduction**

Senate Bill 1349 (*Hertzberg – Ch. 845, Stat. of 2016*) requires the Secretary of State (SOS), in consultation with the Fair Political Practices Commission, to develop and certify for public use an online filing and disclosure system for campaign statements and reports that provides public disclosure of campaign finance and lobbying information in a user-friendly, easily understandable format.

During this past quarter (July 2022 through September 2022), the CAL-ACCESS Replacement System (CARS) Project team continued its planning activities. A summary of activities currently underway are:

(1) Planning and execution of market research activities necessary to determine the most viable solution to procure; (2) preparing to onboard a project planning support services contractor to develop a solicitation document to acquire a System Integrator, plan and implement business process re-engineering activities, and assist with data readiness; (3) developing project planning documents including project budget, project schedule, solution requirements, and other necessary project management plans; (4) recruiting project resources and leveraging existing SOS staff expertise to assist with the project planning effort; (5) meeting with the California Department of Technology (CDT) in both its advisory and oversight roles to decrease project risk; (6) acquiring an independent verification and validation (IV&V) services contractor; and (7) engaging stakeholders in project update and working group meetings.

## **Progress for the Period of July 2022 through September 2022**

The CARS Project made the following progress this past quarter:

- The project obtained the CDT's formal approval of its Stage 1 Business Analysis document on July 26, 2022.
- Project Charter and Project Governance Plan have been drafted, reviewed by stakeholders, and are nearing completion.
- Several bids were received in response to the Project Planning Contractor Request for Offer released on August 12, 2022. These bids will be evaluated during October 2022. The winning contractor is expected to be onboarded in early November 2022.
- The Assistant Project Director role was onboarded on September 19, 2022. The Political Reform Division, the Project Management Office, and the Information Technology Division continue their efforts to recruit and hire limited-term and permanent full-time staff.

## **Scope, Schedule, and Budget**

**Scope:** The scope has not changed during this reporting period.

**Schedule:** The schedule has not changed during this reporting period and includes pre-planning and planning activities that began in February 2022. A project end date is not yet known and will be developed when a System Integrator is acquired and provides an estimated project completion date. Initial planning estimates show a System Integrator onboard during March 2024. Based on information contained in the Independent Assessment Report, project implementation is estimated at 27 months.

**Budget:** The enacted 2022-23 state budget includes \$11.3 million to acquire limited-term, permanent full-time, and contract staffing, in addition to other project-related resources. The budget contains the following budget bill language related to the available funding:

- Of the \$11.3 million total funds, \$8.03 million is immediately available to the project.
- The remaining funds will become available to the project after all the following are met:
  - CDT approves the Stage 1 Business Analysis - Completed on July 26, 2022
  - An update is provided to the Joint Legislative Budget Committee (JLBC)
  - The JLBC approves the project's access to the remaining funds.