

AGENDA

- Welcome
- CARS Project Team Introductions
- Accomplishments in 2020
- Project Approach and Timeline
- CARS Architecture
- API Development Approach
- CARS 2020 – Sneak Peek
- Q&A / Wrap Up



CARS PROJECT TEAM INTRODUCTIONS



SOS Team

- **Julie Waddell (Project Sponsor)**
Chief, SOS Political Reform Division
- **Cruz Nieto**
Project Management Office Director
- **Keven Star**
Solution Implementation Manager

OSaaS Team

- **Carlo Grifone**
OSaaS Project Executive
- **Beena Amarnath**
OSaaS Project Manager

ACCOMPLISHMENTS IN 2020

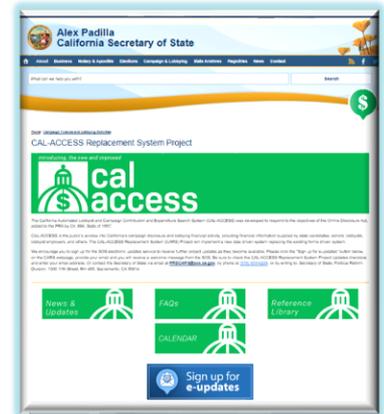


- January 2020: Pivoted to Salesforce as the CARS platform
- February 2020 through July 2020
 - Onboarded new project management team and consultants
 - Conducted competitive bid process to replace System Integrator (SI)
 - Validated requirements, scope, and timeline with new SI
 - Designed solution architecture and data model
 - Started Agile development process

PROJECT APPROACH



- Leverage experiences and knowledge gained over three years
- Adhere to statutory requirements
- Honor Stakeholder Input Group (SIG) Charter
- Provide two-way communication
 - SIG meetings (approximately every six to eight weeks)
 - CAL-ACCESS website
 - Contact CARS mailbox (PRDCARS@sos.ca.gov) for questions/comments



PROJECT APPROACH (CONT'D)



- Local System Integrator (SI) selected in competitive process (OSaaS)
- OSaaS started June 1 – Built many system components and demonstrated them to SOS
- Working on three work streams with SOS integration into each
 - CAL-ACCESS Replacement System (CARS)
 - Data transfers from large filers (Software Vendors - SWVs)
 - Portal for CARS

PROJECT APPROACH (CONT'D)



- Building CARS in an iterative fashion
- Construction based on requirements, business rules, use cases and user stories
- Using multiple Subject Matter Experts (PRD, CTA, and FPPC experience)

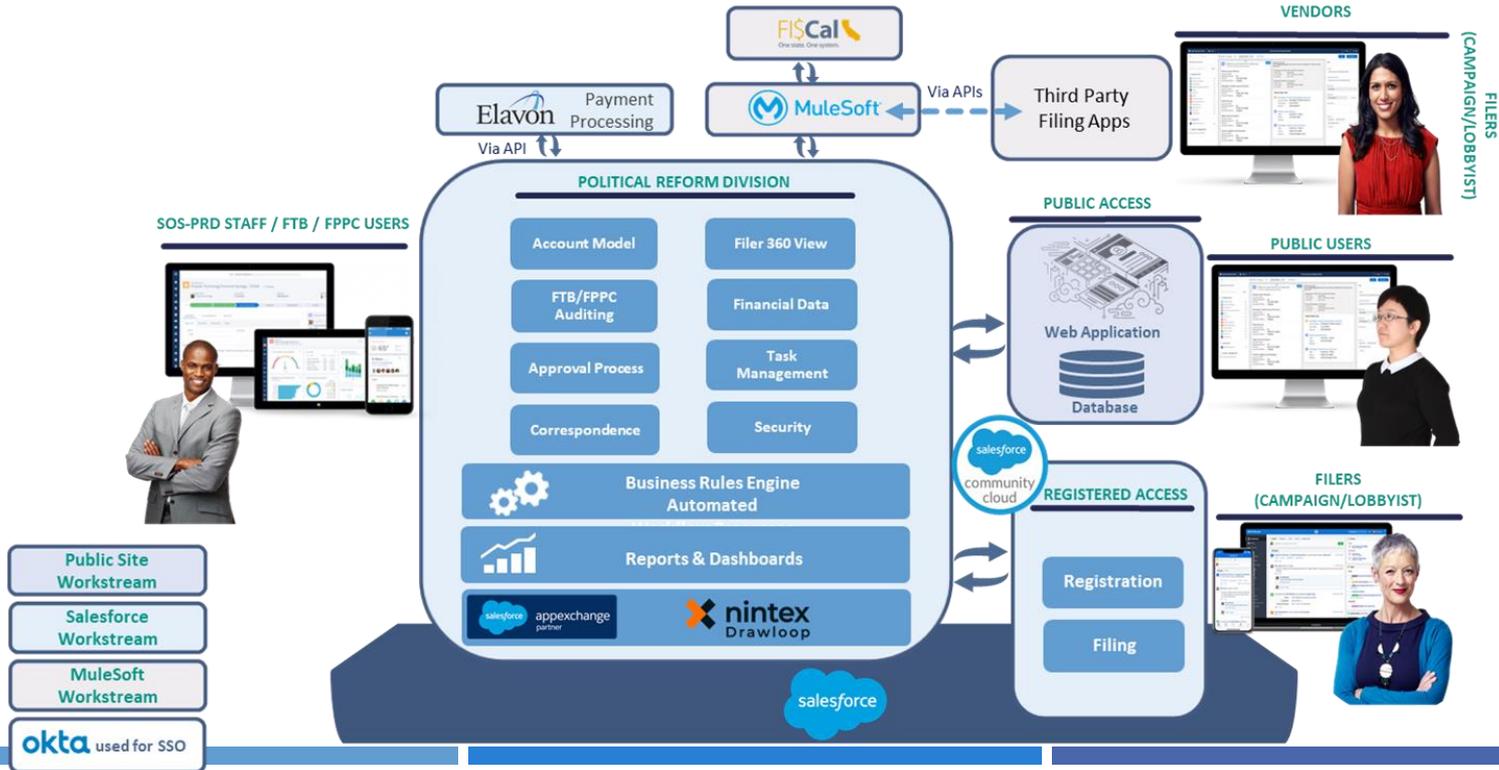
PROJECT TIMELINE



Key Activities

- **JULY 2020 – JANUARY 2021:** Application Development
- **SEPTEMBER 2020:** Software Vendor Testing
- **OCTOBER 2020:** SOS Application Testing
- **JANUARY 2021- FEBRUARY 2021:** SOS User Acceptance Testing
- **MID THROUGH LATE FEBRUARY 2021:** External Stakeholder Instructions
- **EVERY 6 TO 8 WEEKS:** SIG Meetings

CARS ARCHITECTURE



API DEVELOPMENT APPROACH



Deliver Working Endpoints



- ✓ Publish Vendor API specifications
- ✓ Publish mock-service endpoints that provide schema and basic validation
- ✓ Provide Vendors testing credentials based on current CAL-ACCESS

Collaborate & Improve



- ✓ Host design and feedback review sessions with Vendor community
- ✓ Assess, prioritize and implement improvements in collaboration with Software Vendors
- ✓ CARS backend connection development proceeds in parallel
- ✓ Develop and publish support documentation

Connect to CARS



- ✓ Connect the Vendor APIs to backend CARS services
- ✓ Conduct end-to-end testing, including full record validation
- ✓ Provide Vendors with production credentials and instructions
- ✓ Publish production endpoints and services
- ✓ Provide training and cutover assistance



Screen shots of CARS were shown to attendees.

Screens may change prior to Go-Live – based on SOS Political Reform Division user feedback.



Q & A

Future meetings: Approximately every six to eight weeks



Visit the CAL-ACCESS project website
(<https://www.sos.ca.gov/campaign-lobbying/cal-accessreplacement-system-project-cars-updates/>)

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

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

CAL-ACCESS Replacement System Project (CARS) Updates

Alex Padilla
California Secretary of State

What can we help you with? Search

2018 January 2018 January 2018 January

CAL-ACCESS Replacement System Project

introducing the new and improved

cal access

The California Automated Lobbyist and Campaign Contributor and Expenditure Search System (CAL-ACCESS) was developed in support of the state's Open Access Act, passed by the Assembly in 2013. CAL-ACCESS is the public's window into the California's campaign disclosure and lobbying financial activity, providing financial information supplied by state candidates, donors, lobbyists, political employers, and others. The CAL-ACCESS Replacement System (CARS) Project will implement a new data-driven system replacing the existing forms-driven system.

We encourage you to sign up for the CARS website updates service to receive further project updates as they become available. Please click the "Sign up for e-updates" button below, or the CARS webpage, provide your email and you will receive a welcome message from the CARS. To learn more the CAL-ACCESS Replacement System Project updates timeline and enter your email address. Or contact the Secretary of State via email at PRDCARS@sos.ca.gov, by phone at [916.227.3300](tel:916.227.3300) or by writing to Secretary of State, Political Reform Division, 1500 11th Street, 4th-5th, Sacramento, CA 95834.

News & Updates

FAQs

Reference Library

CALENDAR

Sign up for e-updates