



Training Module:

APD Template

County APD Process Training

November 16, 2007



Agenda

- Introduction
- Module Objectives
- APD Template Sections
- Common Issues and Findings
- How to get started
- References
- Q&A

Introduction

Goals for the APD template:

- Provide better direction on APD requirements for compliance with state and federal regulations
- Develop consistency in APDs across projects
- Standardize and simplify state review
- Maximize efficiencies for state and county resources

Module Objectives

- Overview of Standard APD template
- Purpose of template sections
- Overview of detailed templates

APD Detailed Templates

- **SAWS/Generic**
 - Project benefits welfare-related programs
 - Project indirectly benefits multiple programs
- **CWS/CMS**
 - Project benefits CWS programs
- **Dual**
 - Project benefits both CWS and welfare-related programs.
 - APD requires approval of both project approval units

APD Template

California Health and Human Services Agency

Office of Systems Integration (OSI)

Title: Enter Title

County Name: Enter the County Name

APD Submission Date: Enter Date as Month Name, Day, 4-Digit Year

APD Type:

Enter the APD Type (CWS/CMS, Dual, SAWS/Generic)

Tracking Number:**

(CWS/CMS or SAWS Project Office will assign tracking Number after first submission of APD)**

1 Description of Request

- **Overview** of request:
 - What?
 - How many?
 - Timeframe?
 - **Date of purchase/implementation**
 - **Period of time for services**
 - Summary Table

2 Business Justification

- **Why is this acquisition necessary?**
 - Separate training module

3 Impact on Operations and Programs

- **Impact of not completing project or acquisition**
 - Current operations
 - Administration of public assistance programs

4 Benefiting Programs

- **Programs that will benefit from use of goods or services**
 - Separate Training Module

5 Cost and Cost Allocation

5.1 Acquisition Costs Description

- Itemized detail of one-time and recurring costs

5.2 Cost Allocation Methodology

- Separate training module

6 Method of Procurement

- **How will the equipment, software or services be purchased?**
 - Separate training module

7 Cost-Benefit Analysis

- **Qualitative Benefits**

- Benefits are intangible
- Costs difficult to accurately quantify

- **Quantitative Benefits**

- Examination of the benefits associated with the acquisition in relation to the cost
- Comparison of the baseline cost with the cost of the proposed alternative
- Payback period

8 County Contact Information

- **County APD Preparer (Required)**
- **Additional County Contact (Optional)**
 - Fiscal or Administrative Manager
 - IT Director or Manager
 - Department Director

Common Issues and Findings

- All sections completed
- Sufficient level of detail
- Consistency throughout sections

How to get started

- Identify request
- Begin APD as early in the fiscal year as possible
- Utilize checklists and detailed templates
- Request clarification and/or direction before, or any time during, development of APD
- For questions about which detailed template to use (e.g. generic, dual), contact SAWS

How to submit APDs

- **SAWS/Generic**
 - Project.Approvals@osi.ca.gov
- **CWS/CMS and Dual**
 - CWS_APD@osi.ca.gov

References

- <http://bestpractices.osi.ca.gov/countyapd/countyapd.aspx>
 - APD Template (Standard)
 - APD Template (SAWS/Generic)
 - APD Template (CWS/CMS)
 - APD Template (Dual)
 - Is an APD Necessary? Checklist
 - OSI APD Review Checklist
 - APD Content Development Aid

Thank You