

DRAFT PENDING STATE/FEDERAL REVIEW AND APPROVAL

Requirements Info				Contractor Response				For Consortium Use Only	
Type	Req. #	Category	Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REC Met	Reviewer Comment
ST	1	Staffing	The Contractor shall employ an approach for Staffing management that facilitates a productive working relationship with Consortium Staffing as well as the DD&I Contractor Staffing and progresses towards task completion.	Y	<p>Team Deloitte meets and exceeds this requirement by assembling a team of professionals who have extensive experience working on projects that have many County and Consortium staff, a variety of subcontractors and Vendor partners working together in productive relationships. All staff proposed to support CaWIN on this project have previous experience working with state-level leadership, county staff, business partners, partner agencies, DD&I vendors, and IV&V staff. Team Deloitte is comprised of seasoned professionals with extensive experience working within Health and Human Services, as well as mixed staffing environments. They are well versed in partnering with county staff and contractors to achieve a common mission. Our proposed Project Manager, Juli Baker, has been previously employed by the Consortium's DD&I Vendor (Accenture), and also managing teams across multiple types of organizations. She has maintained a productive and cooperative relationship with Accenture's leadership team from past engagements. She is coming to CaWIN with a similar mindset - to continue building upon that collegial relationship she established at her previous project, to drive to success for CaWIN migration.</p> <p>Our proposed OCM Manager, Rick Lytle, as well as Renee Carter, our proposed Training Manager, have worked alongside professionals from the Consortium staff and the current DD&I vendor on past HHS engagements. They are familiar with the Consortium's PCD and Communication plan, the DD&I vendor's methodology, design, and development process, and risk and issues mitigation processes. Such experiences were accrued while working on key State of California projects such as LRS, C-IV, and CaWIN itself. Rachel Frey, our Project Executive, and Michelle Peregrine (at CalHEERS) and Libby Bacon, our proposed advisors, relate well with DD&I vendor leadership. In fact, more than half of our proposed staff have had direct experience working alongside CaWIN's current DD&I Vendor, as well as with Consortium staff.</p> <p>Team Deloitte exceeds this requirement by basing our staffing approach on a mirrored organization model. To foster productive working relationships, our staffing approach is based on a mirrored organization model with our clients to provide clear responsibilities, smooth interactions, and attention to all Project activities. Alignment of our organization with yours provides clear channels of communication between staff members that have ownership over similar parts of the Project. Alignment of team members facilitates faster issue resolution, helps to keep the Project on schedule, and supports joint ownership of issues and milestones. Section 6.2.1.1 of our Staffing Approach outlines how we plan on interacting with Consortium staff and the DD&I Vendor, Accenture.</p>	6-7 6-49	6.1.1.2 6.3.1		
ST	2	Staffing	The Implementation Support Contractor shall ensure all Implementation Support Staffing clearly understand both initial and ongoing roles and responsibilities, and how the Implementation Support team and assignments relate to the overall CalSAWS Migration Project plan.	Y	<p>Team Deloitte meets this requirement by assembling a team that is able to quickly ramp up to the roles and responsibilities assigned to them and to learn about the current CalSAWS organization. All members of Team Deloitte have substantial previous work experiences in Health and Human Services, and/or within the State of California, so they bring program knowledge. Many of their past projects were carried out at the State and/or county-levels. Team Deloitte understand the criticalities, complexities, and sensitivity of such a multi-phase business process transition. It impacts all levels of the organization, and the constituents CaWIN counties serve. Based on over 25 years of supporting State of California Projects, Team Deloitte establishes formal onboarding program for all practitioners joining this Implementation Support Project. This onboarding program applies to its subcontractors and partner firms as well. All staff will be given a thorough introduction to their roles and responsibilities, key deliverables, work products, the history of CalSAWS and CaWIN, the relationships to C-IV and LRS, and timelines established by the Consortium before formal work begins.</p> <p>Working sessions will be set up with CaWIN's DD&I Vendor upon Project start to align upon proposed and upcoming implementation-related activities, and to establish productive working relationships. For example, when CalHEERS M&O transitioned from Accenture to Deloitte, leaders from both organizations met to discuss all workstreams and outstanding risks and issues. A series of working sessions were devised to help keep the transition on schedule, and to ensure business continuity on behalf of CalHEERS' operations. Working sessions with Accenture included leadership discussions, milestone reviews, work plan updates, and also progress reports for their State counterparts. A similar, collaborative approach has been established for Team Deloitte's anticipated collaboration with CaWIN leadership, CaWIN counties, Consortium Leadership, and the DD&I vendor's leadership team.</p> <p>Team Deloitte exceeds this requirement by proactively assigning Rachel Frey and Juli Baker, as well as Michelle Peregrine and Libby Bacon to attend Consortium public meetings. All four executives have been attending JPA and PSC meetings to become better acquainted with the current CalSAWS environment and to stay on top of changes as they develop. They will be fully focused on accelerating the ramp-up of Team Deloitte and they require that the entire team that is bid achieve a complete understanding of the Project Plans and their roles and responsibilities.</p>	6-24 6-47	6.2.1.4 6.3		
ST	3	Staffing	The Contractor Staff Approach shall support and demonstrate the following for all Implementation Support Staffing: a) Good oral and written communication skills; b) Eligible to work in the State of California; c) Qualified to perform their assigned role and corresponding tasks and responsibilities; and d) Actively participate in designated project meetings and represent the best interests of the Consortium, identify and escalate issues as appropriate, and contribute to required weekly and monthly status reports.	Y	<p>Team Deloitte meets and exceeds this requirement by having a team with the ability to communicate well orally and in writing with diverse groups of users and to convey relevant BPR, OCM, training and implementation terms and concepts to stakeholder audiences. Our staff understand that the success of the transition relies on how efficiently it supports all of the different audiences impacted by the forthcoming implementation. Our staff are all eligible to work in the state of California. Each person is qualified to perform their assigned role, tasks and responsibilities. Our staff will be located at project sites, and in counties as needed. They participate in project meetings and always represent the best interests of the Consortium while they identify and escalate issues and contribute to required status reports. For more information on the capability and skills of our team members, please see their biographies in Section 6.2 - Meet Team Deloitte.</p> <p>Team Deloitte exceeds this requirement by identifying a team of professionals who do not require sponsorship of any kind to live and work in California. All staff proposed for the CaWIN Project are U.S. Citizens and have the legal right to live and work in the State of California. Over half of Team Deloitte have completed past projects in the State of California. Three out of six staff members identified for the CaWIN Project currently live in California.</p>	6-3	6.1		
ST	4	Staffing	The Contractor shall minimize Staffing turnover to the extent possible, particularly for Key Staff.	Y	<p>Team Deloitte meets this requirement by staffing our team primarily with professionals who are local to California and are qualified in their domain of expertise. We utilize our firm's mature staff identification and vetting processes to identify qualified staff and institute multiple rounds of interviews to confirm fit with the needs of the Consortium. This helps reduce staff turnover, as our staff are confirmed as a good fit and less likely to have staffing concerns once staffed on the project.</p> <p>Team Deloitte also exceeds this requirement by proposing staff who are well versed in how to manage staff availability and onboarding, as well as a proactive methods to manage, review and inform CaWIN leadership and counties of any planned or unplanned staffing changes. With an extensive history of projects here in California, we are committed to getting all of our assigned projects done with the staff initially proposed. Team Deloitte thoroughly understands and commits to supporting the intricacies of staffing individuals who can commit to getting the job done well. Section 6.3.4.2 further explains how we monitor and address staff changes to minimize turnover.</p>	6-57	6.3.4		
ST	5	Staffing	The Contractor's Staffing shall be dedicated to the Implementation Support Project unless otherwise described within the Implementation Support Contractor's approach and is approved by the CalSAWS Executive Director.	Y	Team Deloitte meets this requirement by confirming that all key staff will be 100% committed to the CaWIN Project. In addition, Team Deloitte agrees to consult the CalSAWS Executive Director for staffing-related changes, updates or transitions. Our CaWIN implementation support project approach is focused on deploying dedicated staff. This applies to key staff and non-key staff. Key staff are fully aligned to the CaWIN implementation support project, and their performance is also fully tied to the roles and responsibilities outlined for their position on the project. Section 6.2.4 summarizes the location and availability of staff during the course of the Implementation Support Project.	6-45	6.2.4		
ST	6	Staffing	Work by Contractor Staffing shall be performed at an approved project site or approved County site in the 18 Counties, unless alternate arrangements are approved in writing by the CalSAWS Executive Director.	Y	Team Deloitte meets this requirement by committing to have our staff located at the CaWIN project site such as the CaWIN M&O Project site, with travel to the approved County site in the 18 Counties, as needed for meetings. Team Deloitte has the flexibility to travel to appropriate locations within California to support specific CaWIN county-level activities and tasks. We agree that any alternative arrangements would need to be approved by the Executive Project Director in writing.	6-45	6.2.4		
ST	7	Staffing	All Contractor Key Staff shall be dedicated and on-site, or at an approved appropriate location, for the duration of the project appropriate for their position and job duties.	Y	Team Deloitte meets this requirement by committing to have our staff located at the CaWIN project site such as the CaWIN M&O Project site, or at an approved appropriate location, for the duration of the project and as appropriate to their role. Team Deloitte has the flexibility to travel to appropriate locations within California to support specific CaWIN county-level activities and tasks.	6-45	6.2.4		
ST	8	Staffing	For any expected Implementation Support Staff changes, the Contractor shall provide a 30-calendar day notice to the Executive Director regarding the change and plans for transition. The Implementation Support Contractor shall provide the Consortium a resume and three references for any recommended replacement Staff.	Y	Team Deloitte meets this requirement by regularly reviewing the project work plan at project status meetings and reviewing the status of deliverables and work threads. As part of these meetings we provide notice to the Executive Director, or their designee, providing 30 days notice at minimum if staff change is planned. For those individuals being replaced with a new resource, the Project Manager will provide a resume and 3 references to the Consortium. This information is intended to help confirm the fit of the newly proposed staff member for the project's current and future needs. The Executive Director will work directly with the Implementation Support Project Manager to confirm or reject proposed candidates.	6-57	6.3.4		

ST	9	Staffing	For any unexpected Implementation Support Staff changes, the Implementation Support Contractor shall provide the Consortium Executive Director a written notification within three (3) business days of knowledge and staff action. Within seven (7) days of providing such written notice, the Implementation Support Contractor shall provide the Consortium Executive Director with plans for transition.	Y	Team Deloitte meets this requirement by agreeing to provide Consortium Director a written notification within three (3) business days of knowledge or staff action. Within 7 business days of written notice, the Project Executive Director and Project Manager will work together to provide the Consortium Executive Director within plans for the transition.	6-57	6.3.4		
ST	10	Staffing	The Contractor shall be responsible for identifying and correcting performance issues for its entire Staff (i.e. employees and subcontractors). Should the Consortium discover performance problems with any Implementation Support Contractor Staff, the Executive Director will notify the Implementation Support Project Manager as soon as is reasonably possible. If the Executive Director requests removal of any Implementation Support Staff person, the Implementation Support Contractor shall immediately remove such Staff from the CalWIN Implementation Support Project.	Y	Team Deloitte meets this requirement by continually assessing and confirming full compliance with the RFP, with particular emphasis on Team Deloitte's projects schedule, scope, and resource management. Team Deloitte follows a rigorous and structured performance review process for all team members allocated to the CalWIN Project. Expectations will be clearly laid out for each team member. Should deviations occur, the Implementation Support Project Manager addresses them immediately. She then works to address issues with specific Team Deloitte members to bring alignment back to the project schedule and their assigned work products and deliverables. The Implementation Support Project Manager meets weekly with the Executive Director to discuss the project's overall status. At this weekly meeting, any team performance issues will also be discussed. If the Executive Director requests removal of a Team Deloitte staff member due to a performance-related issue, the Implementation Support Project Manager will remove the person from the project immediately. Section 6.3.4 outlines how Team Deloitte monitors and addresses staff changes to minimize turnover.	6-57	6.3.4		
ST	11	Staffing	The Implementation Support Project Manager shall manage the overall Implementation Support scope of services, manage and lead the team and administer the Agreement. The Implementation Support Project Manager is responsible for ensuring the Implementation Support Project receives company support, commitment, and oversight to meet or exceed all of its contractual requirements. The Implementation Support Project Manager shall have the decision-making authority to bind the Implementation Support Contractor contractually to all terms and conditions in the Agreement.	Y	Team Deloitte meets this requirement by proposing Juli Baker, a highly respected and experienced project manager with extensive California system delivery and implementation experience. Juli will be responsible for the overall delivery of all aspects of the CalWIN Implementation Support Services Agreement and has direct access to Deloitte firm leadership for any support she requires. As a leader within the firm, and the overall Project Manager for the project, she will have full support from firm leadership to ensure the project's objectives are successfully achieved. Team Deloitte exceeds this requirement by extending experts from Deloitte's Government and Public Services Leadership Team to help Juli support CalWIN counties in this transition. Team Deloitte is supported by a Project Executive, BPR Advisor, and Implementation Advisor. This group of firm leaders were carefully selected to help Juli, as well as all key staff, preemptively identify risks, issues and bottlenecks during every phase of the project. During the course of the project, they will actively meet with Juli to review the project plan, upcoming deliverables, and the overall scope of activities being managed by Team Deloitte. They bring extensive experience in identifying innovative ways to complete specific implementation tasks, and can pull in other Deloitte experts, as considered necessary. The Project Executive, BPR Advisor, and Implementation Advisor will collectively help the Project Manager receive the support, commitment, and oversight to meet or exceed all of Team Deloitte's assigned contractual obligations. The final decision-making authority for the support Team Deloitte is providing CalWIN counties lies in the hands of the Project Manager, Juli Baker.	6-36 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	12	Staffing	The Implementation Support Project Manager shall: a) Ensure the Contractor's Implementation Support team understands the scope of the Agreement and the Implementation Support role in the "big picture" of the Migration Project, including how to work in concert with the Counties, the Counties and the Contractors; b) Oversee the development and delivery of all Implementation Support deliverables, work products, tasks and services and ensure they are of the highest quality and are delivered in accordance with the approved work plan; c) Recommend issue resolution and risk mitigation strategies; d) Provide as-needed support to the Consortium management team in the form of development and delivery of presentation materials, general advice and recommendations and assistance in addressing concerns and solving problems; and e) Participate in ongoing communications and status updates to the CalSAWS JPA Board of Directors, Project Steering Committee (PSC) and State and Federal Stakeholders as directed by the Executive Director.	Y	Team Deloitte meets this requirement by: a) F14Confirming our Project Manager and team understands the 'big picture' of the Migration Project, and the impact it will have on all levels of the county's transitioning to CalSAWS. All staff proposed for the CalWIN Project have extensive experience managing workstreams related to the implementation of large-scale technology platforms. However, before starting the project, the Project Manager will meet with all team members to review their roles, responsibilities, project deliverables, work products, and the overall project work plan. This will help staff understand the 'big picture' of the Migration Project. We work with our team also to provide expectations for working collaboratively with the Consortium, Counties, and Contractors. b) All tasks, milestones and planning activities will be reviewed by the Project Manager on a rolling basis, throughout the lifecycle of the project. Adjustments will be made by the Project Manager and PMO Lead, in collaboration Consortium management. The Project Manager and PMO Lead will both work to review, monitor and evaluate work products and deliverables developed by staff on the Implementation Support Project. c) We use a defined method of identifying, reviewing, escalating and assigning issues and risks which may arise during the lifecycle of a project. The Project Manager and PMO Manager are well-versed in identifying issues, risks, and mitigation strategies. The Project Manager will fully acquaint herself with the issue and risk registers in place for the CalSAWS project, and support CalWIN leadership, as well as the DD&I Vendor, in identifying suitable risk mitigation strategies. Proper steps will be taken by the Project Manager to document and/or communicate risk mitigation strategies through the appropriate CalSAWS Project channels. d) The Project Manager will provide as-needed support to the Consortium Management team, as needed, for developing and delivering presentation materials, and providing general advice, recommendations, and assistance to address concerns and solving problems. The Project Executive, BPR Advisor, and Implementation Advisor are also available to provide support and guidance to the Consortium Management Team, as requested by the CalSAWS Executive Director. e) The Project Manager will continuously be involved in ongoing communications at all levels (with JPA, PSC, State and Federal stakeholders) - as directed by the Executive Director.	6-36 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	13	Staffing	The Implementation Support Project Manager shall meet at least the minimum qualifications: a) Eight (8) years of experience with large-scale (contract value of \$10M+) projects, information system development and implementation experience or Implementation Support of a system development project (health and human services systems preferred) including experience in a leadership position; b) Five (5) years of Project Management experience and management of risks and issues; and c) Five (5) years of experience managing a team of 10 or more people.	Y	Team Deloitte meets this requirement by proposing an Implementation Support Project Manager, Juli Baker, with over 22 years of experience working on large-scale projects, and over 10 years of experience with management of risks and issues, managing teams of 10 or more staff. Team Deloitte exceeds this requirement by proposing an Implementation Support Project Manager, Juli Baker, who exceeds the eight (8) year requirement to deliver large-scale projects valued at over \$10M. She exceeds this requirement with 22 years of large-scale HHS project experience, including her most recent project experience at California eWOC and Covered California. Those projects were valued at \$30M and \$500M, respectively. All of Juli's professional experiences have been within Health and Human Services. Juli exceeds the requirements of having at least five (5) years of Project Management experience. She has over 30 years' experience managing blended teams, including those comprised of State staff and multiple vendors and business partners. She has served as a client executive on key California projects, both as a State employee and as a Contractor. As a project manager and executive for over 30 years, she has played an active role in managing multi-faceted project-related risks and issues. Lastly, Juli has direct experience partnering with, and working for, the CalSAWS DD&I vendor, Accenture Consulting. She served as a client executive for Accenture Consulting, helping manage and deliver large-scale technology initiatives in California, including the C-IV Migration, which was similar in nature to the CalWIN migration.	6-12 G-1	6.2.1.1 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	14	Staffing	The Implementation Support PMO Lead shall: a) Establish and maintain the Master Work Plan and ensure understanding of and adherence to those deliverables by the Implementation Support team; b) Lead or support the development and delivery of all Implementation Support deliverables and work products and ensure they are of the highest quality and are delivered in accordance with the approved work plan; and c) Establish and manage implementation support related issue resolution and risk mitigation strategies.	Y	Team Deloitte meets this requirement by confirming the responsibilities of our PMO lead will include the following tasks: - Establishing and maintaining the Master Work Plan - Leading or supporting the development and delivery of all deliverables and work products - Establishing and managing implementation support-related issue resolution and risk mitigation strategies Team Deloitte exceeds this requirement by proposing Richard Neumann for this role. Richard has led similar tasks for over 2 years at Deloitte's Oregon Integrated Eligibility (IE) project, a large, complex project similar in scale to the CalWIN transition. He also served as the PMO Lead for the State of Louisiana's SNAP/IANF/DSNAP Project. In addition, Richard also led the PMO workstream for nearly 4 years at the State of Washington Health Benefit Exchange (WAHBE). On all three projects, his PMO managed a large project work plan, maintained a risk register in JIRA, and reported out issues on a weekly basis using a Tableau Dashboard. He has over 7 years experience leading a PMO Lead. As a Training Manager for California's Department of Industrial Relations, he also managed risks, issues, and deliverables centered around training design, development, environment management and end user training delivery.	6-36 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		

ST	15	Staffing	The Implementation Support PMO Lead shall meet at least the following -minimum qualifications: a) Three (3) years of experience in leading a PMO in a systems integrator, State, County, Consortium or Implementation Support role; and b) Three (3) years of experience with large scale Health and Human Services systems projects.	Y	Team Deloitte meets and exceeds this requirement by proposing Richard Neumann. Richard exceeds both the three (3) year requirement to lead a PMO in a system integrator or implementation support role as well as the three (3) year requirement for assisting large-scale HHS systems projects. Richard most recently worked three (3) years in the State of Oregon supporting an IE & ME project valued over \$150M. There, Richard administered a project plan based on PMI Standards, in which he is currently certified, and advised project leaders on where the State is doing well, and where they are falling short. Additionally, Richard brings over four (4) years of PMO experience supporting the State of Washington implementation of its Integrated Eligibility System (WAIEB). Beyond his PMO experience on two (2) key HHS projects, Richard also possesses a solid training delivery and management background. Richard served as the Training Manager for California's Department of Industrial Relations (DIR) for over six (6) months. This HHS project enabled him to manage a training workplan for 50 trainers and 1500 end users. Richard also served as a trainer for CaMWN for over two (2) years. He helped deliver CaMWN training to staff across six (6) California counties. Richard brings over seven years experience across multiple major HHS projects, most recently as the PMO Lead for a statewide Medicaid project in Oregon for the last 2+ years.	6-16 G-1	6.2.1.2 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	16	Staffing	It is desirable that the Implementation Support PMO Lead possess a current PMI PMP certification.	Y	Team Deloitte meets this requirement by proposing Richard Neumann as the Implementation Support PMO Lead. Richard has possessed a PMP Certification since 2009. His certification is valid, and Richard works to actively maintain his certification through continuing education and the application of PMBOK principles in his project work.	6-16 G-1	6.2.1.2 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	17	Staffing	The Implementation Support OCM Manager shall work closely with the Implementation Manager and the BPR Implementation Manager to ensure that BPR and OCM activities are coordinated and communicated within and across the Implementation Support teams and with the Contractors, Consortium and Counties	Y	Team Deloitte meets this requirement by delivering an OCM Manager with extensive experience in working across workstreams in order to develop thoughtful and well-defined business processes. Rick Lytle has over 7 years of experience designing, developing and implementing impactful OCM plans at large-scale state and local organizations. He has worked on several State of California projects, including CaMWN itself. His past projects have included working closely with the BPR Manager and Implementation Manager to coordinate communications, trainings awareness sessions and documentation. He fully understands the intricacies of managing an OCM workstream, and partnering with his BPR and Implementation counterparts to deliver a cohesive, well-refined user transition in a new way of working.	6-37 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	18	Staffing	The Implementation Support OCM Manager shall plan, prepare and execute all OCM activities and associated deliverables and work products for Implementation Support Project.	Y	Team Deloitte meets this requirement by proposing Rick Lytle as the Implementation Support OCM Manager. Rick has over 18 years experience working in health and human services OCM, BPR and Implementation Support. He is well versed in drafting, communicating and executing upon agreed upon OCM Plans. This includes identifying and planning OCM activities, deliverables, work products and key milestones to be tracked on the overall project work plan. Team Deloitte exceeds this requirement by presenting the CaMWN Project a seasoned professional with extensive OCM experience. Rick has recently served OCM and BPR-related roles at DCSS, as well as CaMWN. He is very comfortable partnering with county leadership, stakeholders, DD&I vendors and business partners to create carefully defined OCM plans and deliverables. With over 25 years of experience in HHS, Rick exceeds the requirements to execute upon this assigned responsibility.	6-37 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	19	Staffing	The Implementation Support OCM Manager shall: a) Align County stakeholders, increase awareness and adoption of the changes, provide opportunities for County staff involvement in the change, and provide opportunities for change leadership; b) Understand the As-Is business processes and To-Be processes and activities required to migrate to CalSAWS; c) Manage Implementation Support resources necessary for executing the OCM Plan; and d) Ensure on-schedule performance of all OCM planning, execution, and review activities.	Y	Team Deloitte meets this requirement by identifying Rick Lytle as the OCM Manager to support CaMWN counties on this pivotal transition to CalSAWS. Rick has over 18 years work experience working in HHS, as well as OCM-related initiatives within key State of California implementation projects. His work on these projects included aspects that meet subparts a thru d of this requirement. Team Deloitte exceeds this requirement by proposing an OCM Manager with substantial experience aligning county stakeholders and staff during the course of a large-scale implementation. In the past, Rick has worked directly in CaMWN counties, where he supported the OCM, BPR and Implementation workstreams. He has actively sought out ways to gather feedback and insights from county leaders, staff and business partners as he develops OCM plans for key project phases or milestones. With 18 years of HHS experience, Rick is well-versed in defining As-Is/To-Be business processes for state and local organizations. He has developed detailed change impacts for subsets of stakeholders to ensure appropriate items are captured in future business processes. Rick is very comfortable managing resources necessary to execute the OCM Plan. As a founding member of Business Advantage, Rick has led teams of staff on major State of California projects, as well as partnered with vendors to deliver services to state and local organizations. In his past roles at CaMWN and the Franchise Tax Board, he has consistently demonstrated he is able to manage the implementation resources necessary to deliver large-scale OCM plans, as well as execute OCM activities on-time, with the confinements of the schedule presented to him.	6-37 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	20	Staffing	The Implementation Support OCM Manager shall meet at least the following minimum qualifications: a) Three (3) years of experience in a leadership role for developing, implementing organizational change management and gap strategies on a project with over 1,000 concurrent users; b) Three (3) years of experience developing OCM Plans and delivering OCM services; and c) Four (4) years of experience with HHS systems and projects.	Y	Team Deloitte meets this requirement by presenting an OCM Manager with over 18 years of experience leading, developing and executing OCM programs for key state, local and HHS initiatives. Rick Lytle's professional career spans over 25 years. From his experiences at DCSS, CaMWN, and FIB, Rick accrued over 80 months of organizational change management and gap strategies experience. With these 3 projects alone, he has exhibited nearly 7 years of professional work experience in OCM-related work. He has over 10 years of experience working in HHS. His resume only represents a portion of that work experience. His work experience includes experience that meet subparts a thru c of this requirement. Team Deloitte exceeds this requirement by having an OCM Manager which has extensive experience leading large-scale OCM workstreams, and direct experience working with CaMWN counties. Between late 2008 and mid-2014, Rick directly worked with CaMWN counties on key OCM and Project-Management related initiatives impacting counties. He spent 69 months developing and executing organizational change management plans for CaMWN counties. He also worked alongside his county directors, assistant directors, managers and supervisors to monitor the results of those OCM plans and strategies. Rick Lytle is not only a solid OCM manager, he is an individual who knows how to work with CaMWN county staff at all levels. He understands the environment in which he must operate in to design, develop and monitor change management activities for CaMWN counties transitioning to CalSAWS. The OCM plans he developed for DCSS, CaMWN and FIB were for end user audiences of over 1,000 concurrent users. They were major system implementations for the State of California.	6-24 G-1	6.2.1.4 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	21	Staffing	The Implementation Support Training Manager is responsible for leading the development of Training plans, materials, curricula, and delivery of Training to the 18 CaMWN Counties. The Training Manager shall work closely with the OCM Manager to ensure that BPR and change management information and results are appropriately incorporated into Training curricula and materials.	Y	Team Deloitte meets this requirement by proposing a Training Manager with extensive experience developing and executing comprehensive training plans for large-scale HHS projects. Renee Carter is a seasoned training manager who has served as the training manager for key State of California Projects such as CalHEERS, LRS and Consortium IV (C-IV). During the course of each of these projects, Renee did lead a team of developers and trainers to delivered blended training programs to key State of California agencies. Team Deloitte exceeds this requirement by relying on Renee's extensive experience in the State of California as she gears up to support the BPR Manager, OCM Manager and Implementation Manager in supporting CaMWN counties. She recognizes the importance of working with each of the 18 county-level leaders to define customized training programs for their staff. She will work closely with the OCM Manager to align OCM plans with planned training activities. For example, if there is a need to deliver awareness sessions on key system topics, Renee will work with Rick Lytle, our proposed OCM Manager, to define the cadence and timing for such sessions. She will work with the BPR Manager (Nikki Wegner) to understand the scope of business process changes, and how best to incorporate that into the training plan. Renee has over 22 years of experience leading large-scale training program. She will be an asset to the Consortium in helping align OCM, BPR and training activities for the Implementation Support Project.	6-38 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	22	Staffing	The Implementation Support Training Manager shall: a) Lead the effort to develop and execute the Master Training Plan and county-specific plans that serve as the guides for the Implementation Support Training team; b) Manage Training resources necessary for executing the Master Training Plan and county-specific plans; c) Work collaboratively with the Training Managers and Trainers from the 18 CaMWN Counties to plan, develop and deliver training; d) Apply improvements to Training materials as they are tested and used; and e) Ensure on-schedule performance of all Training planning and execution activities.	Y	Team Deloitte meets this requirement by proposing a training manager with extensive experience developing and managing training plans at the state and county level. Renee Carter has led the development and delivery of impactful training programs for CWS-CARES, CalHEERS, LRS and Consortium C-IV. For example, for the LRS project, Renee managed the development of 125 eLearning modules, 200 job aids, and over 30 instructor-led participant and instructor guides. She coordinated the deployment of classroom training and eLearning courses to 5,000 pilot users. She did work with department and county-level staff to validate county-specific plans for training delivery. She has a solid history in collaborating with all levels of the organization she has helped support. Her work on these projects cited delivery of subparts a thru d of this requirement. Team Deloitte exceeds this requirement by reflecting on the extensive experience Renee Carter brings to her role as Implementation Support Training Manager. Her training programs have consistently been for staff exceeding 1000 concurrent end users, and have been comprised of all levels of state and local organizations. She has experience managing detailed review cycles for training materials, as well as obtaining Subject Matter and county-level buy-in on the overall structure of developed training materials. She has developed training within the constraints of the methodology defined by the Consortium's current DD&I vendor. This experience was obtained during her time at LRS and Consortium C-IV. She will work with the Consortium to ensure training activities are completed on schedule. She will work closely with the Implementation Support PMO Lead, as well as the Project Manager, to ensure training activities are properly tracked in the Master Work Plan, and any issues, impediments and delays are communicated early on. She looks forward to collaborating with the trainers from all 18 CaMWN counties, as such experiences were similar to her past training delivery experiences at LRS, CWS-CARES, and Consortium C-IV.	6-38 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		

ST	23	Staffing	The Implementation Support Training Manager shall meet at least the following minimum qualifications: a) Five (5) years of experience in a leadership role developing and delivering training plans and materials on a project with over 1,000 concurrent users; and b) Four (4) years of experience with Health and Human Services Training and Implementation systems projects.	Y	Team Deloitte meets this requirement by presenting a training lead who has over 30 years experience developing and implementing training programs on Projects with over 1,000 users. Her work experience far exceeds the minimum requirement of four (4) years of experience with Health and Human Services Training and Implementation systems projects. Team Deloitte exceeds this requirement by reviewing Renee's expansive history in delivering complex training programs for key State of California Projects for over 30 years. She has worked on State of California Projects for over 30 years. Her role on all of these pivotal projects were in the realm of training design, delivery and support. The referenced projects exceed the required concurrent user count described in the RFP requirement. For example, CWS-Cares, the project Renee helped deliver as their training lead, had over 5,000 county social workers and support staff. For LRS (LEADER Replacement System), the pilot user base alone was estimated to be 5,000. On CalHEERS, her training plan was comprised of developing training materials for over 15,000 County Eligibility Workers, and 30,00 Enrollment Counselors and Enrollment Agents. Similar user bases can be identified in her representative resume submitted as part of this RFP response. Renee's work experiences are extensively within the HHS space. She has worked on State of California projects for over 30 years. She exceeds the requirement of possessing four (4) years of experience within HHS with her combined training manager experience on CWS-CARES, LRS, CalHEERS, and her two tours leading training initiatives at Consortium C-IV.	6-28 G-1	6.2.1.5 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	24	Staffing	The Implementation Support Implementation Manager shall: a) Provide support and advice to the Counties preparing for, executing and supporting cut-over to CalSAWS; and b) Coordinate with the Counties, Consortium, OCM Manager and OCM teams, Consortium DD&I teams, and conversion teams in planning and carrying out implementation support tasks.	Y	Team Deloitte meets this requirement by proposing an Implementation Manager with over 15 years of experience managing implementation activities for large-scale technology projects. Cathryn van Namen comes to CalWMN with extensive cross-state experience in managing the implementation workstream for key transformation projects. For example, as the Organizational Change Management and Training Senior Manager for the Tennessee Eligibility Determination System (TEDS), Cathryn led the introduction of a new portal for nearly 5,000 workers in nursing homes and hospitals. Similar experiences were captured during her time at the State of Georgia. As BPR, OCM and Communications Senior Manager, Cathryn developed the As-Is Assessment for the State's IES system. She provided extensive support, guidance and oversight to state and county leaders for the system's implementation, and ongoing adoption by staff. She even implemented a culture change strategy to help support this transformation. Team Deloitte exceeds this requirement by presenting a Implementation Manager with over 16 years of implementation support experience for large-scale HHS projects. Based on Cathryn's past experiences, she fully recognizes the importance of partnering with County, Consortium and DD&I vendor teams to help coordinate implementation activities for CalWMN counties. Key areas of focus for her will include data conversion and validation. She will work with the BPR Manager, Nikki Wegner, to help educate staff on where to find cases, tasks and activities previously carried out in their legacy systems. Having clearly defined documentation to help guide staff in how their caseload was converted will help in user adoption and overall buy-in as to what the system has to offer. Cathryn led similar initiatives in the State of Tennessee and Georgia. She looks forward to being a trusted advisor to Consortium, County, and project staff.	6-38 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	25	Staffing	The Implementation Support Implementation Manager shall: a) Lead the effort to develop and execute the Implementation Support Plan and County plan chapters that serve as the guides for the Implementation Support team; b) Work closely with the 18 CalWMN Counties to plan and manage the pre- and post-implementation support team presence in each County; c) Manage Implementation Support resources necessary for executing the Implementation Management Plan; d) Identify and apply lessons learned and best practices from the early implementations to the later implementations; and e) Ensure on-schedule performance of all implementation planning and execution activities.	Y	Team Deloitte meets this requirement by proposing an Implementation Manager, Cathryn van Namen, who has led the development and execution of implementation support plans for four state clients including Georgia, Illinois, Hawaii, and Tennessee. Through each of these projects, she's directly collaborated and supported state agencies and county offices, in addition to managing implementation resources, to support a smooth roll-out, while effectively managing communication and change. Based on her experience with other complex states, she fully recognizes and expects to share lessons learned and recommendations with CalWMN Counties transitioning to CalSAWS. Finally, she will work directly with Juli Baker, Nikki Wegner, Renee Carter, and Rick Lytle to ensure implementation planning and execution activities are on-schedule. Team Deloitte exceeds this requirement by presenting a Implementation Manager with over 16 years of implementation support experience for large-scale HHS projects. Based on Cathryn's past experience with large-scale transformation programs, she recognizes the importance of collaborating with County staff, as each CalWMN county will have their own culture and processes. She also recognizes that it's essential to have a County-based implementation plan that includes tasks that are similar across counties, but also include tasks that are specific to each County. This uniqueness in our approach ensures that CalWMN counties successfully transition towards CalSAWS.	6-38 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	26	Staffing	The Implementation Support Implementation Manager shall meet at least the following minimum qualifications: a) Three (3) years of experience in leading the implementation or transition of a large-scale government system with at least 1,000 users in a systems integrator, implementation support, and/or County/State role; b) Three (3) years of experience with Health and Human Services Systems projects; and c) Two (2) years of experience with Training, OCM and implementation support in a System Implementation initiative.	Y	Team Deloitte meets this requirement by proposing an Implementation Manager, Cathryn van Namen, who has 16 years of experience with large-scale transformations, specifically within the Health and Human Services domain, and with an end user base of over 1,000 concurrent users. In addition, Cathryn brings over 14 years of experience working in OCM, Training, and Implementation Support in a systems implementation initiative. Team Deloitte exceeds this requirement by proposing an Implementation Manager, Cathryn van Namen, who has 16 years of large-scale government systems implementation experience. Her most recent project with the State of Tennessee reached over 1.3 million end users across 3 different portals. Through her 10 years of experience in supporting eligibility systems, Cathryn exceeds the requirement of having at least three (3) years of experience with Health and Human Services Systems projects. Cathryn exceeds the requirement of two (2) years of experience with Training, OCM and implementation support in a System Implementation initiative. Across her two most recent projects for the States of Tennessee and Georgia alone, she has accrued 4 years of experience in leading Training, OCM, and Implementation support.	6-32 G-1	6.2.1.6 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	27	Staffing	The Contractor shall provide a monthly, deliverable-based Staff loading schedule using Attachment A - Price Proposal Schedules. The Staff Loading will be separated from the Price Proposal for the Staffing Approach review. The Contractor shall provide a description of how Staffing estimates provided within Attachment A - Price Proposal Schedules were developed and how adjustments will be	Y	Team Deloitte meets this requirements by having public sector estimation staff work with workstream managers to collect inputs from different work threads and phases of the CalWMN Implementation Support Project. These inputs include work plan tasks, work products, and deliverables; requirements and their grouping by complexity and level of effort; as well as the key activities during the Discover, Define, Development, Deliver, and Iterate project phases. Team Deloitte then feeds these inputs into our staffing estimation tool where we continually refine our estimates, to arrive at a bottom-up approach to provide a monthly, deliverable-based work plan with staffing needs.	6-53	6.3.2		
ST	28	Staffing	The Contractor shall provide Staffing resumes and qualifications for all Staffing in accordance with the format prescribed in Attachment G - Staff Resumes/Staff Qualifications	Y	Team Deloitte meets this requirement by adhering to the format provided for this RFP response. All staff have stated their qualifications listed using the resume template provided, and qualifications have been highlighted in Section 6 - Staffing Approach, as well as the Executive Summary. Within Attachment G, Part 1 and 2 of each resume clearly articulate how staff meet, if not exceed, requirements for the roles they have been proposed to	G-1	Attachment G, Key Staff Resumes/Staff Qualifications		
ST	29	Staffing	The Contractor shall provide two (2) Individual Reference Checks for all Key Staff in accordance with the format prescribed in Attachment H - Individual References.	Y	Team Deloitte meets this requirement by confirming all key staff referenced on this RFP response have 2 professional references to validate their past work experiences in Attachment H. A majority of the references provided are from clients in the State of California, or within the HHS space.	H-1	Attachment H, Individual References		
ST	30	Staffing	The Business Process Re-Engineering Manager (BPR Manager) will provide support and recommendations to the Counties preparing for executing and supporting migration to CalSAWS. The BPR Manager will lead the development and execution of the BPR Plan and each individual County's specific plan. The BPR Manager will work closely with the Implementation Support OCM and Implementation Managers to ensure that BPR activities are coordinated and communicated within and across the Implementation Support teams and with the Contractors, Consortium and Counties.	Y	Team Deloitte meets this requirement by proposing BPR Manager, Nikki Wegner, who has over 5 years of experience leading the development and execution of BPR initiatives for government systems with at least 1,000 concurrent users. Team Deloitte exceeds this requirement by proposing BPR Manager, Nikki Wegner, who has significant project experience centered around statewide BPR redesign in the State of Ohio and Illinois. Nikki has substantial experience leading the development and execution of BPR plans in both states. She has also developed county-specific BPR plans for both statewide projects. Key stakeholders in designing these BPR plans were department managers, directors, and supervisors. In collaboration with OCM, she also deployed a change network to help solicit feedback from field staff and business partners on the overall plan. The BPR plans developed on both projects impacted large audiences of staff, and were crafted in collaboration with state and local subject matter experts. Her previous BPR planning activities in Ohio and Illinois did include coordinating review meetings with project leaders and field staff. Nikki has over 5 years of experience managing cross-functional teams which have helped prepare counties for go-live readiness, as well as pilot drafted business processes to targeted audiences for early feedback. She has successfully developed deep relationships with county leaders and subject matter experts to bring them along the journey in identifying, developing, and deploying comprehensive business process changes.	6-37 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		

ST	31	Staffing	<p>The BPR Manager is responsible for planning, preparing and executing all BPR activities and associated Deliverables and work products for Implementation Support. Responsibilities include, but are not limited to:</p> <p>a) Documenting and assessing current and future business processes and roles in order to facilitate the identification of significant differences between the current and future business processes and roles and analyze and identify significant gaps;</p> <p>b) Leading the effort to develop and execute the Business Process Re-engineering Plan and county-specific plans that serve as the guides for the BPR Support team;</p> <p>c) Facilitating workshop sessions to define and refine business processes based on data and available analytics, encouraging outside-the-box thinking;</p> <p>d) Using data and analysis to drive decision making at both the executive and team levels;</p> <p>e) Working closely with the Counties to plan and manage the implementation of business process changes in each County;</p> <p>f) Managing Implementation Support resources necessary for executing the BPR Plan; and</p> <p>g) Ensuring on-Schedule performance of all BPR planning.</p>	Y	<p>Team Deloitte meets this requirement by confirming our proposed BPR manager's responsibilities will include items identified in sub parts A through G of this requirement. Our proposed BPR manager, Nikki Wegner, brings experience in all of the stated sub parts. For example, for documenting and assessing current and future business processes, Nikki led the BPR workstream in the State of Ohio to help identify as-is and to-be business processes. She conducted workshops with key stakeholders to understand current automated and manual processes, as well as key design gaps to consider. As the system continued to be developed and refined, she continued these efforts. At the Ohio Department of Medicaid, she led a similar workstream as the Business Process and Training Lead for the project. She worked at the cross-section of BPR design, readiness, and training. Her experiences translate well to the tasks CalWIN counties may need to take on as they transition to CalSAMS. Nikki has managed Implementation Support resources in her past roles in Ohio and Illinois. She has also collaborated with contractors and state staff to develop, review and execute defined BPR activities during every phase of the project.</p> <p>Team Deloitte exceeds this requirement by the fact that Nikki has over 5 years practical work experience in BPR design. She has led similar initiatives on several projects. For example, at the Illinois Department of Human Services, Nikki's BPR efforts impacted the work of over 5,000 staff. Business process redesign involved leading the efforts to develop and execute BPR Plans, county-specific plans, and developing detailed guides for support staff. She has conducted a series of workshops to guide the future state of the department, and to also use data and analytical tools to help map out potential trouble spots in key processes. Much of her work involved closely working with state and county leadership to develop comprehensive transition plans for specific subsets of staff.</p>	6-37 G-1	6.2.1.7 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	32	Staffing	<p>The BPR Manager shall have at least the following minimum qualifications</p> <p>a) Three (3) years experience in leading BPR for a large-scale government system with at least 1,000 users in a systems integrator, Implementation Support, and/or County/State role;</p> <p>b) Three (3) years experience conducting As-Is/To-Be analysis and documenting process reengineering;</p> <p>c) Three (3) years experience with HHS systems and</p>	Y	<p>Team Deloitte meets and exceeds this requirement by proposing a BPR Manager, Nikki Wegner, who has over 5 years of Business Process Redesign Experience across subparts A thru C of this requirement. A majority of Nikki's BPR experience was accrued on the Ohio Benefits (OB) project, as well as the Illinois IES Project. For the Ohio Department of Jobs and Family Services, Child Care Project, Nikki managed BPR activities for nearly 1,200 users. For the Ohio Benefits (OB) Project, the project's end user base exceeded 6,000. For the Illinois IES project, the end user base was over 5,000 staff across the state. BPR activities for all three projects included understanding As-Is/To-Be business processes, as well as developing methods of communicating the new methods of working to all staff impacted by the forthcoming implementation. Nikki has over 5 years experience conducting As-Is/To-Be analysis, and the documentation which supported such BPR activities. She has also led the delivery of BPR communications, trainings, and follow-ups with staff in the field. All of her past project experiences have been within the HHS space.</p>	6-20 G-1	6.2.1.3 Attachment G, Key Staff Resumes/Staff Qualifications		
ST	33	Staffing	<p>The Implementation Support Contractor's Staff shall be dedicated to the Implementation Support Project unless otherwise described within the Implementation Support Contractor's approach and approved by the Executive Director. Work must be conducted at an approved Project site or in the 18 Counties as described in Section 1.5, unless alternate arrangements are approved in writing by the Executive Director.</p>	Y	<p>Team Deloitte meets this requirement by confirming that all key staff and non-key staff allocated to the Implementation Support Project will be fully dedicated to the project. Work will be conducted at an approved Project site such as the CalWIN M&O Project Site, or within CalWIN's 18 counties, as required for specific work products, deliverables, or implementation activities. Alternate work arrangements for Team Deloitte will be reviewed collectively by the Implementation Support Project Manager and Consortium Executive Director. The location of key staff and non-key staff has been outlined in Section 6.2.4 Location of Staff. The Project Manager and PMO Lead will work with the Consortium Executive Director to confirm which work products, deliverables, or tasks require staff to travel and gather inputs from county staff in one of the 18 CalWIN Counties. Such requests will be validated with the Consortium Executive Director in writing.</p>	6-45	6.2.4		
ST	34	Staffing	<p>All Key Personnel assigned to the Implementation Support Project must be dedicated and on-site, or at an approved appropriate location, for the duration of the Implementation Support effort appropriate for their position. The Project hours are based on a 5-day, 40-hour work week, beginning 12 PM PT on Monday and ending 12 PM PT on Friday, with 10-hour workdays Tuesday through Thursday.</p>	Y	<p>Team Deloitte meets this requirement by confirming that all key staff allocated to the Implementation Support Project will be fully dedicated to the project. Work will be conducted at an approved Project site such as the CalWIN M&O Project Site, or within CalWIN's 18 counties, as required for specific work products, deliverables, or implementation activities. Alternate work arrangements for key staff will be reviewed collectively by the Implementation Support Project Manager and Consortium Executive Director. In addition, Team Deloitte agrees and confirms that key personnel will work according to the defined project hours based on a 5-day, 40-hour work week, beginning 12 pm PST on Monday and ending 12 pm PST on Friday. The location and hours of availability for key staff has been outlined in Section 6.2.4 - Location of Staff.</p>	6-45	6.2.4		

Requirements Info			CalWIN Training, OCM and Implementation Support Requirements	Contractor Response				For Consortium Use Only	
Type	Req. #	Category	Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REQ Met	Reviewer Comment
PS	1	Proposal Content	Proposals shall be received by the designated date and time. Late or incomplete proposals will not be accepted. Proposals shall be delivered electronically using the designated SharePoint location and submission of USB flash drives via regular mail , expedited delivery such as Federal Express- messenger/courier service, or hand delivered by a Contractor representative . Proposal submissions must be sent to the RFP/Proposal contact as defined in Section 6.2 .	Y	Team Deloitte meets this requirement by submitting our proposal by the designated due date and time. Our proposal is delivered electronically using the designated SharePoint location and submission of USB flash drives to the RFP/Proposal contacts as defined in Section 6.2.	N/A	N/A		
PS	2	Proposal Content	The Contractor shall submit the proposal in two separate volumes, separately packaged and clearly labeled according to the following categories: a) Volume 1 – Transmittal Letter and Business Proposal; and b) Volume 2 – Price Proposal	Y	Team Deloitte meets this requirement by submitting our proposal in two separate volumes, separately packaged and clearly labeled according to the following categories: a) Volume 1 – Transmittal Letter and Business Proposal b) Volume 2 – Price Proposal	N/A	N/A		
PS	3	Proposal Content	The Contractor shall submit Volume 1, Transmittal Letter & Business Proposal: a) One (1) Hardcopy electronic signed original b) Ten (10) electronic copy flash drives	Y	Team Deloitte meets this requirement by submitting the following items for Volume 1, Transmittal Letter & Business Proposal: a) One (1) electronic signed original b) Ten (10) electronic copy flash drives	N/A	N/A		
PS	4	Proposal Content	The Contractor shall submit Volume 2, Price Proposal: a) One (1) hardcopy electronic signed original b) Five (5) electronic copy flash drives	Y	Team Deloitte meets this requirement by submitting the following items for Volume 2, Price Proposal: a) One (1) electronic signed original b) Five (5) electronic copy flash drives	N/A	N/A		
PS	5	Proposal Content	Proposals shall be on 8½ x 11-inch pages, except for charts, diagrams, Microsoft Excel spreadsheets, which may be on an 8½ x 14-inch pages. The text font must be 11-point Century Gothic. In tables, 10-point or 11-point font size may be used.	Y	Team Deloitte meets this requirement by submitting our proposal on 8½ x 11-inch pages, using text font 11-point Century Gothic, and in tables, 10-point or 11-point font size.	All	All		
PS	6	Proposal Content	The Proposal shall be organized into numbered sections and subsections using a decimal numbering system. The pages within each section shall be sequentially numbered.	Y	Team Deloitte meets this requirement by organizing our proposal into numbered sections and subsections using a decimal numbering system. Also, the pages within each section are sequentially numbered.	All	All		
PS	7	Proposal Content	Figures and tables should be assigned index numbers and should be referenced by these numbers in the proposal text and in the proposal Table of Contents. Figures and tables should be placed as close to text references as possible.	Y	Team Deloitte meets this requirement by assigning figures and tables index numbers with each of them referenced by these numbers in the proposal text and in the proposal Table of Contents. In addition, figures and tables are placed as close to text references as possible.	All	All		
PS	8	Proposal Content	Proposals shall be clearly written in the English language.	Y	Team Deloitte meets this requirement by providing our proposal in clearly written English.	All	All		
PS	9	Proposal Content	Electronic copies must be submitted prepared using the Microsoft Office Suite. PDF format is acceptable for financial statements and other firm-related financial information. Volume 1 must be submitted on ten separate flash drives.	Y	Team Deloitte meets this requirement by submitting electronic copies using the Microsoft Office Suite.	N/A	N/A		
PS	10	Proposal Content	Volume 1 and Volume 2 must be submitted on separate flash drives and in clearly labeled packages to the RFP Contact Identified in Section 1.7 . The electronic proposals shall not be password protected.	Y	Team Deloitte meets this requirement by submitting Volume 1 and Volume 2 on separate flash drives and in clearly labeled packages. The electronic proposals are not password protected.	N/A	N/A		
PS	11	Proposal Content	The appropriate Proposal volumes shall contain the following: a) Volume 1 – Transmittal Letter and Business Proposal: •Cover Page •Transmittal Letter •Table of Contents •Executive Summary •Firm Qualifications •Implementation Support Approach -- Project Management -- Business Process Reengineering -- Organizational Change Management -- Training Development and Delivery -- Implementation and Conversion Support -- Additional As-needed Support •Staffing Approach •Proposed Changes to Draft Agreement •Required Attachments b) Volume 2 – Price Proposal: •Cover Page •Table of Contents •Price Schedules (Attachment A – Price Proposal Schedules)	Y	Team Deloitte meets this requirement by submitting the appropriate Proposal volumes per the format outlined in this requirement.	N/A	N/A		

PS	12	Proposal Content	The Proposal shall contain a transmittal letter and shall include the following: a) The Contractor's business name and address; b) The Contractor's legal entity, such as: corporation, partnership or other entity; c) The Contractor's legal entity, such as: corporation, partnership or other entity; d) The Contractor's Primary Business Contact including name, title, phone number, email; e) a statement certifying that neither the organization, proposed subcontractor organizations, nor any of their principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal, State or County department or agency; f) a reference to all RFP amendments received by the Contractor; if none has been received, a statement to that effect must be included; g) a statement indicating whether the Contractor has had any contracts terminated within the last five years. If any such terminations exist, the Contractor must include details regarding the contract, the reason for termination, date of termination, and client contact information; h) a statement indicating whether the Contractor is or has been involved in litigation regarding any contracts to which the Contractor is a party, within the previous five years. If any such litigation exists, the Contractor must include details regarding the contract, the reason for litigation, date of litigation, and client contact information; i) A description of any formal relationships with the Consortium or CalWIN Counties over the last twenty-four (24) months;	Y	Team Deloitte meets this requirement by addressing each of the requirements in the transmittal letter and in the required format.	1-3	1		
PS	12 Cont.		j) A description and associated contract number(s) of any existing contracts between the Contractor's organization, or any party named in the Contractor's response to this RFP, with the Consortium or CalWIN Counties. If no such contracts exist, so declare; k) A description of how the Contractor will address any potential conflicts between the work underway on current contracts and the Implementation Support Project; and l) a statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period of time, which must be at least 9 months from the Proposal due date specified in Section 2 or through the end of contract negotiations whichever is later.	Y	Team Deloitte meets this continued requirement by addressing each of the requirements in the transmittal letter and in the required format.	1-3	1		
PS	13	Proposal Content	The Transmittal Letter shall be signed by an officer or agent of the Contractor's organization who is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. The Contractor shall include the job title of the individual who signs the letter.	Y	Team Deloitte meets this requirement submitting the Transmittal Letter signed by Rachel Frey, who is a principal and serves as an agent of our organization. She is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. We include the job title of the individual who signed the letter.	1-9	1		
PS	14	Proposal Content	Price information must not be included in the transmittal letter.	Y	Team Deloitte meets this requirement by not including any price information in the Transmittal Letter.	1-9	1		
PS	15	Proposal Content	The Proposal must contain a table of contents which shows how the entire Business Proposal is organized and presented using a numeric outline format to the fourth level.	Y	Team Deloitte meets this requirement by providing a table of contents that shows how the entire Business Proposal is organized and presented using a numeric outline format to the fourth level.	2-1	2		
PS	16	Proposal Content	The Executive Summary shall condense and highlight the contents of the Business Proposal in such a way as to provide a broad understanding of the Business Proposal. The primary objective of this summary is to provide an overview of the key points in the Proposal. While no specific format need be followed, it should include salient and significant points and minimize highly technical terms. It should be brief and concise, not to exceed ten (10) pages.	Y	Team Deloitte meets this requirement by providing a condensed Executive Summary highlighting the contents of the Business Proposal in such a way as to provide a broad understanding of the Business Proposal. This includes highlighting key points while minimizing technical terms. The Executive Summary does not exceed ten (10) pages.	3-1	3		
PS	17	Proposal Content	The Executive Summary must not contain price information.	Y	Team Deloitte meets this requirement by not including any price information in the Executive Summary.	3-1	3		

Requirements Info				Contractor Response				For Consortium Use Only	
Type	Req #	Category	Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REQ Met	Reviewer Comment
FM	1	Firm	The Firm Qualifications sub-section shall include the Attachment E – Firm Qualifications and additional information that provides the Consortium with a basis for determining Contractor and subcontractor financial, project management, and technical capabilities to undertake a project of this size and complexity. A concise but thorough description of relevant experience is desired.	Y	Team Deloitte meets this requirement by submitting Attachment E - Firm Qualifications and Section 4.0 - Firm Qualifications of our response. This details our experience providing Implementation Support services in similar size and complexity as the CalSAWS transition. Team Deloitte exceeds this requirement by bringing direct experience providing Implementation Services for the core programs (e.g., Medicaid, SNAP, TANF) involved in the CalSAWS transition from 33 eligibility and enrollment (E&E) implementations nationwide, coupled with experience working with all CalWIN counties providing OCM and/or training services.	4-40 E-1	4.2.8 Attachment E, Firm Qualifications		
FM	2	Firm	The Contractor and subcontractor(s) information shall be shown separately. The Contractor and each subcontractor shall provide the requested firm/project details within Attachment E – Firm Qualifications. In the information provided for each subcontractor, the Contractor shall state the business relationship of the subcontractor to the Contractor.	Y	Team Deloitte meets this requirement by providing our contractor and subcontractor information separately as requested by the Consortium.	4-40 E-1	4.2.8 Attachment E, Firm Qualifications		
FM	3	Firm	The Contractor and subcontractor(s) shall each provide three references within Attachment F – Firm References format. Each reference must clearly indicate the reference entity.	Y	Team Deloitte meets this requirement by submitting Attachment F - Firm Reference for all references supplied in this bid. We have provided three references for each Team Deloitte subcontractor.	4-40 F-1	4.2.8 Attachment F, Firm References		
FM	4	Firm	The Contractor shall provide a firm organization chart. If the firm is a subsidiary of a parent company, the organization chart must be that of the subsidiary firm. The chart must display the firm's structure and the organizational placement of the oversight for the Implementation Support Project. The organization chart must include names and be dated.	Y	Team Deloitte members meet this requirement by providing their firm organization charts, which display their structure and the organizational placement of the oversight for the Implementation Support Project. The dated organization charts include names.	4-4	4.1.1		
FM	5	Firm	The Contractor shall provide financial statements for the past two (2) fiscal years shall be provided for the Contractor and each Subcontractor. These must be audited financial statements unless audited statements are not a part of the routine business practices of the firm. The Consortium will accept financial statements audited according to either Generally Accepted Accounting Principles (GAAP), Statutory Accounting Principles (SAP) of the National Association of Insurance Commissioners (NAIC) or the International Financial Reporting Standards (IFRS).	N/A	Not applicable as neither Deloitte nor its subcontractors produce audited financial statements. We have provided unaudited financial information per the option of Requirement FM 6 below.	N/A	N/A		
FM	6	Firm	If the Contractor does not produce audited financial statements or file corporate financial information such as a 10-K as part of its routine business practices, Contractors may provide unaudited financial information that includes information relating to liquidity, assets, liabilities, equity, working capital, current ratio and net revenue. Contractors must also provide a privately placed debt rating from the NAIC, or an equivalent nationally recognized credit rating agency.	Y	Team Deloitte meets this requirement by providing unaudited financial information to enable the Evaluation Committee to assess our financial stability. Deloitte exceeds this requirement. Deloitte's privately placed debt carries an the National Association of Insurance Commissioners' (NAIC) highest designation, NAIC 1, which is comparable to an A or better rating from one of the nationally recognized rating agencies. Deloitte is the largest private professional services provider in the United States. SolutionsWest exceeds this requirement by carrying an Experian Financial Stability Risk Rating of 2, which is the second-lowest risk rating possible from this nationally recognized credit rating agency. Business Advantage exceeds this requirement by carrying an Experian Financial Stability Risk Rating of 1, which is the lowest risk rating possible from this nationally	4-8	4.1.2		
FM	7	Firm	The Contractor shall provide a copy of its Dun & Bradstreet (D&B) D-U-N-S number and Business Information Report, inclusive of its D&B viability and credit ratings.	Y	Team Deloitte members meet this requirement by providing copies of their Dun & Bradstreet (D&B) reports, inclusive of D&B viability and credit ratings.	4-12 4-43 4-60 4-69	4.1.3 Appendix 4A Appendix 4B Appendix 4C		
FM	8	Firm	These financial statements shall be accompanied by a signed statement from the Contractor's or its Parent Company's Chief Executive Officer, Chief Financial Officer or Designee(s), certifying the financial information is accurate and complete. Alternatively, Audit financial statements that include a signed statement by the CEO and CFO, as well as the independent auditors, made a part of the audited financial statement will suffice for the certification letter.	Y	Team Deloitte members meet this requirement by providing signed statements certifying their financial information is accurate and complete.	4-12	4.1.4		
FM	10	Firm	For any proposed subcontractors, items contained in this section 6.3.3.4.1 must also be completed.	Y	Team Deloitte meets this requirement by providing items defined in Section 6.3.3.4.1 for our subcontractor partners SolutionsWest and Business Advantage in Section 4.1 of our response.	4-4	4.1		

FM	11	Firm	The Contractor shall include details of firm experience for both the Prime Implementation Support Contractor and all subcontractors relevant to the proposed Implementation Support within at least the last 13 years. A list of all Implementation Support projects for both the Prime Contractor and all subcontractors within the last 13 years shall be provided within the form in Attachment G – Firm Qualifications.	Y	Team Deloitte meets this requirement by providing Attachment G - Firm Qualifications, which provides a detailed history of our team's experience delivering implementation support services over the past 27 years. Team Deloitte has provided implementation support in over 33 E&E system implementations during this time.	E-1	Attachment E, Firm Qualifications		
FM	12	Firm	The Contractor shall provide a general narrative description highlighting the Contractor's Implementation Support Services experience and capabilities as prime Contractor, subcontractor or other role including the following areas: Proven experience, overall length and capacity of similar services within the firm performing Business Process Reengineering, Training Development, Training Delivery, Organizational Change Management and Implementation Support Services.	Y	Team Deloitte meets this requirement by providing a narrative description in Sections 4.2 - 4.2.8 of our experience and capabilities providing Implementation Support Services. Team Deloitte has provided implementation support services supporting over 125,000 eligibility workers across the Country and in California. These services span OCM, BPR, training, and implementation support.	4-17	4.2		
FM	13	Firm	The Contractor shall supply any additional information not already presented under Section 6.3.3.4.1, Details of Firm Qualifications and Financial Resources, which the Contractor believes to be relevant to the Consortium's assessment of the Contractor and subcontractor experience with regard to the specifics of this RFP.	Y	Team Deloitte meets this requirement by providing additional information that qualifies us to deliver this project in Section 4.2 of our response. Additionally, we have provided a list of additional as-needed Implementation Support Services in Section 5.6 of our response that we can deliver to support the CalWIN Implementation Support Services project.	4-17 5-256	4.2 5.6		
FM	14	Firm	The Contractor shall provide a detailed description of all work to be performed by the subcontractor(s) including: a) Any tasks, or portions thereof, that will be subcontracted must be identified and defined; b) Each subcontractor(s) responsible shall be identified by name; c) The rationale for selection of the subcontractor(s) must be stated; and d) The exact type and amount of work to be done by each subcontractor must be identified and defined.	Y	Deloitte meets this requirement by detailing our rationale for selecting our subcontractor partners, the amount of work planned for each partner, and all items in Subparts A through D in Section 4.3 of our narrative response.	4-41	4.3		
FM	15	Firm	The Contractor shall delineate the percentage of the total Implementation Support Services work the subcontractor will perform by State Fiscal Year. The percentage of work shall be calculated using the subcontractor's portion of the total number of work hours.	Y	Deloitte meets this requirement by delineating the planned percentage of Implementation Support Services and work hours for each of our subcontractor partners in Section 4.3 of our narrative response.	4-41	4.3		

Requirements Info			CalWIN Training, OCM and Implementation Support Requirements		Contractor Response				For Consortium Use Only	
Type	Req #	Category	Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REC Met	Reviewer Comment	
PM	1	Project Management	The Contractor shall provide overall project management for Business Process Reengineering, Organizational Change Management, Training, and Implementation Support for the 18 CalWIN Counties as the Counties plan, prepare and transition onto the CalSAWS Systems.	Y	Team Deloitte meets this requirement through our project management framework, built on lessons learned over our extensive experience delivering similar projects. Using our mature processes, we manage and control our BPR, OCM, training, and implementation support services. We create a Master Plan and 18 County-specific Work Plans to control these service threads and help the CalWIN Counties transition to the CalSAWS system. Team Deloitte's approach also facilitates transition of CalWIN Counties to the new CalSAWS governance and project management-related processes. Team Deloitte exceeds this requirement by utilizing our Elevate the Human Experience (#EHX) project management methodology with our experience of realistic estimation, planning, and staffing implementation support projects. Our	5-16	5.1.1			
PM	2	Project Management	The Contractor shall perform general project management tasks for Implementation Support Services, including: a) Communication management; b) Issue and risk management; c) Scope management; d) DED and deliverable management; and e) Contract management. These key project management activities will be performed in accordance with existing CalSAWS project management processes and standards, as documented in the approved CalSAWS Project Control Document (PCD) contained in the	Y	Team Deloitte meets this requirement by managing all project management activities, including managing communications, issues and risks, scope, DEDs and deliverables, and contract requirements. Our performance of these activities follows existing CalSAWS project management processes and standards, per the CalSAWS PCD. Team Deloitte exceeds this requirement by leveraging our #EHX Method, which offers enhanced capabilities to monitor progress, forecast project needs, and track each thread and their outcomes to measure overall project health and success. Information about these capabilities are included in Section 5.3 or our response.	5-30	5.1.5			
PM	3	Project Management	The Contractor shall document, manage and track decisions made during implementation support planning and execution.	Y	Team Deloitte meets this requirement through clearly defined decision-making processes and consistent practices for documenting action items and decisions, and effectively communicating them to stakeholders. We align with the CalSAWS Consortium's decision tracking management process. The goal is to better inform and include CalWIN Counties in decisions and reduce project conflicts.	5-40	5.1.5.3			
PM	4	Project Management	The Contractor shall establish and maintain the Implementation Support Services Master Work Plan inclusive of tasks, milestones, Deliverables and resources needed to plan and execute the required scope of work.	Y	Team Deloitte meets this requirement with an approach combining parallel and sequential workstreams. In MS Project, we construct a deliverable-based Master Work Plan in which every task has a clearly defined start date, end date, duration, and dependent tasks that need to be completed. The same discipline will be utilized in the creation and upkeep of the individual county work plans. We work both with CalWIN counties and the CalSAWS consortium to align our ongoing maintenance of the Master Work Plan with existing processes.	5-25	5.1.4.3			
PM	5	Project Management	The Contractor shall coordinate and work cooperatively with the CalSAWS DD&I contractor project team and other vendors (such as Quality Assurance and IV&V). Effective communication within and across the Consortium, the Counties and all vendors is of critical importance to the Consortium.	Y	Team Deloitte meets this requirement by aligning with the Consortium PCD and incorporating our project management methodology to plan and manage collaboration with, and inclusion of, all stakeholders, including the current DD&I contractor, as well as additional groups such as Quality Assurance and IV&V contractors. We will coordinate communications with all stakeholders, including status, accomplishments, and schedule to reduce risks related to scope, approach, and direction for the CalWIN Implementation Support Services project. Using existing CalSAWS Consortium communication management methods, we engage stakeholders in the project. Deloitte has successfully worked with Accenture on similar projects in Ohio, Texas, and California. We have also worked with the DXC team as part of their CalWIN team, and in Colorado.	5-28	5.1.4.4			
PM	6	Project Management	The Contractor shall provide a written Monthly Implementation Support Services Status Report and verbal status reports during standing weekly management meetings.	Y	Team Deloitte meets this requirement by providing a monthly Status Report to communicate progress, issues, risks, and performance against the project Work Plan. The Monthly Status Report is distributed to CalSAWS Consortium and CalWIN County leadership. It is created with the Consortium's template in alignment with current CalSAWS projects. Additionally, our Project Manager will meet with Consortium leadership to give verbal status reports at weekly, monthly, and quarterly management meetings, including the quarterly Stakeholder Engagement Group meeting. All the meeting minutes, decisions, and action items are documented and tracked using CalSAWS Consortium tools.	5-34	5.1.5.1			
PM	7	Project Management	The Contractor shall prepare and submit all DEDs, Deliverables and key work products in MS Office file formats to the CalSAWS Web Portal, prepare a corresponding CRFI/CIT to be distributed to the CalWIN Counties and provide one (1) hard copy to the CalSAWS Consortium. LMS Training Materials and other LMS information must be submitted in a sharable, editable file structure, such as Shareable Content Object Reference Model (SCORM), to allow Counties to update Training Materials in the future.	Y	Team Deloitte meets this requirement by creating DEDs, deliverables, and key work products using MS Office formats and following Consortium templates when applicable. When these artifacts are distributed to County stakeholders, they are accompanied by corresponding CalSAWS Request for Information (CRFI) or CalSAWS Information Transmittal (CIT) documents, with a hard copy for the Consortium. Training materials, such as Web-based training modules, are uploaded to the LMS in SCORM 1.2 format, which provides interfaces for the LMS to track progress and participation. Native Adobe Captivate files are saved to the project repository for availability to Counties for future updates. Other training materials, such as videos and text-based materials (job aids and Instructor/Participant Guides) are provided in both native and published formats.	5-43	5.1.5.4			

PM	8	Project Management	The Contractor shall develop integrated, comprehensive Deliverables based on proven methods and practices from other successful public sector implementation projects and commensurately sized, enterprise-scale programs.	Y	Team Deloitte meets this requirement by applying practices for developing deliverables of the highest quality and scope. We base this claim on our long experience and history of involvement with all of California's major SAWS rollouts and migrations, including the original CalWIN rollout, ISAWS, C-IV, the ISAWS to C-IV migration, and LRS. Our work with these major projects in the domain of enrollment and eligibility systems gives us a highly mature perspective and the ability to exceed this requirement regarding the quality and comprehensiveness of deliverables.	5-43	5.1.5.4		
PM	9	Project Management	The Contractor shall: a) Establish and maintain an open communication process at all levels of the project including the Consortium Project Team, Regions/Counties and other Contractors; b) Interact on a day-to-day basis with the Consortium Project Team to support effective communication; c) Participate in standing management and committee meetings, to include but not limited to, CalSAWS JPA Board of Directors, CalSAWS Change Control Board (CCB), CalSAWS Weekly Status meeting.	Y	Team Deloitte meets this requirement through constant collaboration and communication with the Consortium's Project Team, our CalWIN County and regional stakeholders, and the DD&I vendor team. We work closely with the Consortium Project Team, keeping team members and stakeholders informed of project status to avoid surprises and confusion, following the CalSAWS governance model for timely status reporting, and communicating frequently through daily informal channels, such as meeting informally on a daily and weekly basis. We recognize that the Consortium has an extensive and sophisticated communications plan documented in the PCD, and Team Deloitte understands our role in attending all meetings specified in the Communication Matrix, including the JPA Board, Change Control Board, and weekly status meetings. Team Deloitte exceeds this requirement with our capability in building effective communication channels and teams with tools like our Business Chemistry methodology, which enhances communication between all project stakeholders.	5-30	5.1.5.1		
PM	10	Project Management	The Contractor shall Report to the Executive Director significant risks or issues regarding the CalWIN migration effort and any other circumstances that could significantly impact the overall SAWS Migration Project and schedule.	Y	Team Deloitte meets this requirement by following a six-step approach to issue management, which closely aligns with the Consortium's four-step issue management process, to encourage collaboration and support throughout the life of the project, and enabling effective, efficient management of issues across the project resources. If significant risks or issues with the potential to impact the CalWIN migration effort or schedule should arise, Team Deloitte's process allows for timely escalation to the Executive Director. Deloitte's approach to risk and issue management, and escalation to the Executive Director is described in section 4.6.6.	5-38	5.1.5.2		

Requirements Info				CalWIN Training, OCM and Implementation Support Requirements		Contractor Response		For Consortium Use Only	
Type	Req. #	Category	Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REC Met	Reviewer Comment
Del	1	Deliverable 1	The Contractor shall develop a Implementation Support Services Work Plan that includes the following: a) A master or parent Work Plan including high-level activities and Deliverables for the 18 County Implementation Support project. b) County-specific sub- or child Work Plans to include: 1) Tasks and subtask descriptions with Deliverables specifically indicated; 2) Estimated number of Implementation Support Services Contractor staff identified by levels and types; 3) Estimated hours by task and subtask; and 4) Gantt charts showing planned start and end dates (durations) of all tasks, subtasks, and major milestones and Deliverables, including time frames for the Consortium's review and approval of all resulting Deliverables.	Y	Team Deloitte meets this requirement by providing a detailed master Work Plan, as well as County-specific MS Project sub-schedules. These detailed work plans provide tasks, subtasks, Deliverables, and staff assignments to tasks. Complete staffing and effort, in hours, are assigned to each task and subtask. Team Deloitte has experienced project management professionals to manage the MS Project schedules to meet these requirements and produce accurate schedules and Gantt charts that clearly illustrate durations of tasks and subtasks, major milestones, and Deliverables.	5-25	5.1.4.3		
Del	2	Deliverable 1	The Contractor shall update the Work Plan monthly to reflect the following: a) Task and subtask percent complete; b) Actual number of Implementation Support Services App Contractor staff; and c) Actual hours by task and subtask; and d) Updated Gantt charts.	Y	Team Deloitte meets this requirement by utilizing our Elevate the Human Experience (#EHX) project management discipline paired with the Consortium's PCD method to coordinate and manage stakeholder input to track and update percentage complete, contractor staffing counts, actual hours planned vs. worked, and Gantt charts accurately.	5-27	5.1.4.3		
Del	3	Deliverable 1	The Contractor shall submit the Initial Work Plan within 20 calendar days of the project start date and shall update and submit the Work Plan on a monthly basis.	Y	Team Deloitte meets this requirement by providing a detailed MS Project Schedule containing the deliverables required to complete the Implementation Support Services Project. This detailed MS Project Work Plan will be initially submitted within 20 days of project start. The monthly submissions will be coordinated through review with required stakeholders throughout all phases of the project for accurate monthly updates and on-time monthly submissions.	5-25	5.1.4.3		
Del	4	Deliverable 2	The Contractor shall provide a Monthly Status Report that provides details regarding participation by the Implementation Support Services Contractor team. At a minimum the monthly status must include the following: a) An executive summary (both MS Word and MS PowerPoint formats); b) An updated summary of the Work Plan progress against the approved baseline Work Plan; c) Progress, key performance indicators and other metrics tracking for each key task: Project Management, BPR, OCM, Training and Implementation Support; d) An updated list of DEDs and Deliverables drafted, in process, submitted and approved during the period; e) Formal assessments and recommendations regarding the completion of key tasks/milestones and readiness to proceed with subsequent key tasks; f) Issues identified by or assigned to the Contractor; and g) Risks identified by or assigned to the Contractor.	Y	Team Deloitte meets this requirement by providing a detailed Monthly Status Report using the Consortium's format, including the executive summary, updates of Work Plan progress against the baseline Work Plan, complete status of the DED and Deliverables progress, and detailed Risk and Issues tracking.	5-34	5.1.5.1		
Del	5	Deliverable 2	The Contractor shall submit the Monthly Status Report within five (5) calendar days after the completion of a month.	Y	Team Deloitte meets this requirement by submitting the monthly status report within 5 calendar days after the completion of the previous month.	5-35	5.1.5.1		
Del	6	Deliverable 3	The Contractor shall create a Requirements Traceability Matrix (RTM) that tracks the requirements defined in the Attachment J - CalWIN Implementation Support Requirements Cross-Reference Matrix. The RTM shall provide the basis for monitoring and controlling the evolution of each requirement throughout the project management, BPR, OCM, Training development, Training delivery and implementation support tasks.	Y	Team Deloitte meets this requirement by creating and maintaining an RTM that will validate that all requirements defined in Attachment J are delivered. The RTM is designed to maintain a history of requirements, monitor and control how each requirement is evolved and ultimately is met, and provide traceability between requirements and deliverables or work products.	5-41	5.1.5.3		
Del	7	Deliverable 3	The Contractor shall update the matrix and deliver as follows: a) The Initial RTM must be submitted within 60 calendar days of the Project start date; b) Updates must be submitted due ten (10) days following the conclusion of each County wave implementation; c) Updates must be submitted due ten (10) days following the conclusion of each County wave implementation d) Each RTM Update is due on a quarterly basis as an attachment to the Monthly Status Report.	Y	Team Deloitte meets this requirement by creating an RTM that will validate that all requirements defined in Attachment J are checked and delivered. To monitor adherence to system requirements, we will reference the RTM throughout the duration of the project. The RTM is designed to maintain a history of requirements and provide traceability between these requirements as well as other project artifacts and work items throughout the project lifecycle. Team Deloitte will provide updates to RTM and deliver them to the Consortium as noted in the requirement.	5-41	5.1.5.3		
Del	8	Deliverable 4	The Contractor shall develop, execute and lead the 18 CalWIN Counties in executing a Business Process Reengineering Plan , which includes but is not limited to the following approaches to: a) Create the vision, values and objectives of the BPR; b) Complete stakeholder analysis and solicit stakeholder input, stakeholders to be defined by each County; c) Define and document As-Is processes; d) Identify, fully define, recommend and evaluate those processes that offer the most potential impact on the performance outcomes targeted for improvement; e) Identify areas of improvement, redundancies, inefficiencies, inconsistencies, and bottleneck points; f) Define and document To-Be processes and procedures; g) Define high-level and detail business processes that will be impacted by the implementation of CalSAWS in the 18 Counties; h) Work with the Counties to redesign their current business processes resulting from the implementation of CalSAWS and suggest changes to policy and procedures that are required to implement redesigned processes; i) Establish proposed rollout and implementation support plans (Road Maps) for 1) short term process changes that can be implemented and 2) long term process changes that would be implemented as part of CalSAWS rollout. Include a summary of any processes that are a candidate for Business Process Reengineering but are out of scope (parking lot issues); j) Establish metrics to evaluate the redesigned processes in terms of improved performance and organizational efficiency (30/60/90 days evaluations); k) Obtain County approval on recommended process changes or improvements and modify Road Maps, as needed; and document the recommendations l) Identify required tools, environments, and any other items required from the Consortium and/or the DD & I vendors; m) A Section for each of the 18 Counties to address county-specific BPR plans; and o) Assumptions	Y	Team Deloitte meets this requirement by developing, executing and leading all elements of the Business Process Reengineering Plan effort. During the Discovery Phase, our team develops and delivers a BPR Visioning lab to create the vision, values, and objective of the BPR. In collaboration with the OCM team, we develop a stakeholder analysis for both the Consortium and each CalWIN County and define the processes impacted by the implementation. We will use this analysis to gather stakeholder input, conduct site visits, interviews, and observations; and ultimately document As-Is processes for the CalWIN Counties. Throughout our Discovery and Define phases, we identify potential opportunities for process improvement and work to streamline and identify opportunities for success in the future state. We also collaborate closely with the DD&I Vendor, CalWIN Project team, CalSAWS Consortium, and each CalWIN County in the Define phase to document To-Be processes and procedures. In the Develop phase, our team works with each CalWIN County to redesign their current business processes to support the transition to the future state and develops County-level BPR Implementation Roadmaps and Support Plans. In this phase, we also establish metrics to evaluate the new processes and overall implementation, in collaboration with the OCM team. Throughout this effort, we are building County-specific plans, seeking their approval for changes and updates as needed, and coordinating with the DD&I vendor to make sure to-be processes are feasible and implementable. We will also provide a final plan that includes all assumptions and identifies tools, environments, and documents needed from the Consortium, County, and the DD&I vendor. Team Deloitte exceeds this requirement by working closely with the CalWIN Project team and each CalWIN County throughout the project and assigning BPR teams to each County to embed with the workers and staff, learn their operations and procedures, and understand the needs of their clients. This supports a customized and nuanced BPR Plan for each of the 18 CalWIN Counties as they transition to	5-55 5-60 5-62 5-67 5-82 5-90 5-94 5-96 5-101	5.2.1 5.2.4.1 5.2.4.2 5.2.4.5 5.2.5.1 5.2.5.4 5.2.6.1 5.2.6.2 5.2.7.2		

Del	9	Deliverable 5	<p>The Contractor shall develop and execute an Organizational Change Management Plan that defines the scope and contents of the work products to be developed as part of the OCM effort. The OCM Plan will entail the following activities and include, but not be limited to:</p> <ul style="list-style-type: none"> a) Create the vision, values and objectives of the OCM; b) Overall OCM Approach including the approach to development of the Change Discussion Guides; c) Change Readiness Approach; d) Approach to documenting key system changes; e) Communication Strategies; f) Stakeholder Engagement Plan including: Stakeholder Register, Project Phases (and mapping of stakeholders to phases), Areas of Power and Interest/Influence, Engagement Approach (including communications); g) Task descriptions and expected results; h) Resource requirements within the County needed to support OCM functions and activities; i) Roles and Responsibilities for each County and specific OCM functions and activities that each County will conduct; j) High-level schedule; k) Establishment, measurement and reporting of outcomes and quality metrics associated with the adoption of CaSAWS in each County; l) Mitigation plan to resistance by users and stakeholders through the application of structured and intentional proactive strategies; m) Approach to identifying and applying reactive interventions where needed; n) Tools and techniques that can enable County leadership staff to help their staff move to a transformed future state; o) A Section for each of the 18 Counties to address county-specific OCM plans; and p) Assumptions. 	Y	<p>Team Deloitte meets this requirement by collaborating with the Consortium and Counties to develop an Organizational Change Management Plan that clearly defines the vision, values, and objectives for the OCM Plan, the approach for achieving those objectives, and the scope and contents for associated work products. It will include, at a minimum, items A thru P of this requirement.</p> <p>Team Deloitte exceeds this requirement by building this data into ChangeScout so that it is easily accessible by leadership and change professionals. ChangeScout enables the team to centrally coordinate OCM activities and track progress, and presents up-to-date readiness data across Counties. Additionally, Deloitte employs an iterative approach to continually refine the OCM Plan based on stakeholder feedback, readiness assessments, and emerging needs to keep it relevant and impactful.</p>	5-132	5.3.5.1			
Del	10	Deliverable 6	<p>The Contractor shall develop, execute and lead the 18 CaMN Counties in executing a comprehensive County Communication Plan based on a thorough stakeholder analysis that includes but is not limited to:</p> <ul style="list-style-type: none"> a) Overall approach for communication with the 18 migrating Counties and stakeholders; b) Communication and marketing materials that keep executives, managers and other key stakeholders appropriately informed of current activities; c) Creates advance and sufficient awareness to designated stakeholders of events that will require County staff planning; d) Promotes collaboration between the CaSAWS and the variety of stakeholders e.g., the user community, project teams, County leaders, and the public; e) Demonstrates the purpose and value of OCM activities and their contribution to the overall transformation; f) Uses various methods (e.g. Tool kits that can be customized by the Counties) and communications platforms (e.g. newspapers, social media, posters) to aid in the communications process; g) Develops and coordinates the publication of articles and information with County change coordinators, and provide information suitable for Consortium and County use; h) User stakeholder analysis and readiness assessment to develop materials; and 	Y	<p>Team Deloitte meets this requirement by developing, delivering, and leading execution of a County Communication Plan for the 18 CaMN Counties. This plan will be based on a thorough stakeholder and communication channel analysis, and will include, at a minimum, the listed components.</p> <p>Team Deloitte exceeds this requirement by building communications plan elements into ChangeScout, where Consortium and County leadership can easily access their plans and associated tools, track completion, and see assessment results to help analyze the effectiveness of various channels.</p>	5-136	5.3.5.2			
Del	11	Deliverable 7	<p>The Contractor shall produce individual County and role-specific: Change Discussion Guides which will describe in detail the process changes affecting the way staff will perform their jobs utilizing the new System. The Change Discussion Guides must include but not be limited to:</p> <ul style="list-style-type: none"> a) Tasks within each job process; b) Steps the person in the role will complete once they begin utilizing the new System; and c) Impacts to the 18 CaMN Counties along with the steps that the person will stop completing once they begin utilizing the CaSAWS System. 	Y	<p>Team Deloitte meets this requirement by collaborating with Counties to develop County- and role-specific Change Discussion Guides that provide detailed descriptions of process and technology changes affecting how staff will perform their jobs using the new CaSAWS system. They will include, at a minimum:</p> <ul style="list-style-type: none"> a) Tasks within each job process b) Steps the person in the role will complete once they begin utilizing the new system c) Impacts to the 18 CaMN Counties along with the steps that the person will stop completing once they begin utilizing the CaSAWS System <p>Team Deloitte exceeds this requirement by building Change Discussion Guide elements into ChangeScout, where County leadership can also trace process and technology change impacts to roles, and see related communication messages, interventions, and training needs to address those impacts to support leaders and staff through the transition to CaSAWS.</p>	5-149	5.3.6.2			
Del	12	Deliverable 7	<p>The Contractor shall complete the Change Discussion Guides by the date specified by the County prior to 18 CaMN County Migration Training as they will be utilized by County Staff to facilitate change discussions within the County. Additionally, they will be used during the Training sessions so that Staff will be able to reference county-specific policies.</p>	Y	<p>Team Deloitte meets this requirement by completing Change Discussion Guides on an agreed-upon date in coordination with each County prior to their planned training.</p> <p>Team Deloitte exceeds this requirement by coordinating across Business Process, OCM, and Training to build County-specific Change Discussion Guides and policy content into the training curriculum for each County. We will also build related content into ChangeScout, which can be used to map County-specific role and process change impacts to stakeholder groups and associated communications, interventions, and training needs.</p>	5-149	5.3.6.2			
Del	13	Deliverable 8	<p>The Contractor shall develop and execute a CaMN Master Training Plan, to include the following:</p> <ul style="list-style-type: none"> a) Strategy and approach to Training, Training methodologies and overall activities, effort and scope of Training b) Define the Contractor's Training methodologies, activities, scope, effort and reporting for all Counties; c) Approach to working with the Consortium leadership to ensure continued monitoring and management of the Training effort. The plan will provide the overarching strategy and will be supplemented by individual county-specific training plans; d) Curricula topics and delivery methods for training-for-trainers, instructor-led Training and WBT e) Training delivery techniques to be used according to the delivery methods and materials/curricula developed by the Contractor to meet each of the Counties specific needs; f) A high-level Schedule, by implementation wave and by County; g) Approach to engagement of and coordination of the Contractor's County trainers within each County; h) Preparation, logistics, and activities required to develop and deliver Training in each of the Counties; i) How the Contractor will use the LMS automated Training tool to manage the Training schedule, content management, participation and certification of completion; j) Approach for use and access of the CaSAWS Training environments dedicated for CaMN Training development and production; k) How the Contractor will communicate Migration Training material updates, including CaSAWS system code release updates; l) Plan for ratio of trainees to trainers; m) Plan for match of Training curricula to trainees through regular feedback; n) Duration and type of Training for all user roles/functions; 	Y	<p>Team Deloitte meets this requirement by describing our approach for developing the Master Training Plan, and executing the activities defined by it, in Section 5.4 Training Development and Delivery. Our Master Training Plan will be developed with input from the CaSAWS Consortium, CaMN County managers, and the CaSAWS DD&I vendor. It will be comprehensive and cover all items covered in sub-parts A through T of the requirement. We use a training plan template to jump-start development of the Master Training Plan, and refine it after each training delivery wave with lessons learned from each wave go-live. The initial draft of this deliverable is submitted to the CaSAWS Consortium in the first stage (Analysis) of our training development program.</p>	5-181	5.4.5.4			

Del	13	Deliverable 8 Continued	<p>o) Approach to promoting collaboration, assistance and efficiencies across Counties;</p> <p>p) Approach to develop an assessment of individual user success to be administered during each Training class to each user;</p> <p>q) Approach to establish, measure and report outcomes and quality metrics corresponding to successful completion of County Training</p> <p>r) Approach to leverage Training evaluation results and lessons learned to improve Training materials and approach for each wave;</p> <p>s) Strategy and approach for transition and roll off by the vendor to support CaSAWS future ability to meet Training needs of Consortium and County staff; and</p> <p>t) Update the CaWIN Master Training Plan on a monthly basis, or as directed by the Consortium Staff to reflect ongoing Training planning and preparation.</p>	Y	Team Deloitte meets this requirement by describing our approach for developing the Master Training Plan, and executing the activities defined by it, in Section 5.4 Training Development and Delivery. Our Master Training Plan will be developed with input from the CaSAWS Consortium, CaWIN County managers, and the CaSAWS DD&I vendor. It will be comprehensive and cover all items covered in sub-parts A through I of the requirement. We use a training plan template to jump-start development of the Master Training Plan, and refine it after each training delivery wave with lessons learned from each wave go-live. The initial draft of this deliverable is submitted to the CaSAWS Consortium in the first stage (Analysis) of our training development program.	5-181	5.4.5.4		
Del	14	Deliverable 9	<p>The Contractor shall develop County-Specific Training Plans that shall include, but not limited to, the following:</p> <p>a) How instructor led Training will be administered to the Counties;</p> <p>b) How train the trainers will be leveraged for the Counties;</p> <p>c) How the Contractor will manage Training locally and regionally in collaboration with the County Staff;</p> <p>d) How Web Based Training (WBTs) will be accessible to the Counties;</p> <p>e) Criteria and plan (as agreed upon by the) for needed reinforcement or remedial Training;</p> <p>f) Detailed training schedule, for each County;</p> <p>g) Preparation, logistics, and activities required to develop and deliver Training in each of the Counties;</p> <p>h) Training delivery techniques to be used according to the delivery methods and materials/curricula developed by the Contractor to meet each of the Counties' specific needs;</p> <p>i) Plans for the number and layout of the classrooms for each site - the nature of the Training facility shall reflect the number of offices and users that it is intended to support;</p> <p>j) The Contractor shall ensure that Training resources, including trainers, facilities, and equipment, shall be provided at a level to support Training quality and schedule requirements as specified in the approved CaSAWS Training Plan; and</p> <p>k) The Contractor shall develop Training materials that comply with the ADA requirements.</p>	Y	Team Deloitte meets this requirement by having our BPR, OCM, and Training teams work with the Consortium, the Training Advisory Council, and training representatives from each CaWIN County to develop, review, and approve their specific County training plan. County Plans are Master Training Plan subsets focused on the Training Needs Assessment for the County, customized curricula for different job roles (fully developed in the Design Stage), and Implementation Stage activities for training delivery. The County-specific Plan discusses the County to-be business processes, including how remaining ancillary systems in a County will be used to support CaSAWS. The standard training curriculum covers all mandatory system functionality, and may be augmented by courses and modules specific to each County's choices regarding their to-be business processes. All elements of the requirement will be covered.	5-186	5.4.5.5		
Del	15	Deliverable 10	<p>The Contractor shall develop, execute and lead the 18 CaWIN Counties in executing a comprehensive Implementation Support Plan that includes but is not limited to:</p> <p>a) Overall approach including purpose, scope, objectives, methodology and proven practices;</p> <p>b) Roles and Responsibilities of Contractor, Consortium and County staff for each phase of Implementation Support (planning, preparation, implementation and post-implementation);</p> <p>c) Implementation Support activities including planning, preparation, conversion support, pre- and post-cutover for the Contractor, Consortium and the 18 CaWIN Counties;</p> <p>d) Entry and exit criteria for each Wave and County;</p> <p>e) Schedule with key tasks and milestones by Wave, by County and reflecting the relationship to the master CaSAWS DD&I schedule;</p> <p>f) Tools and techniques to support the Implementation effort;</p> <p>g) How results and proven practices will be applied to future Waves and Counties;</p> <p>h) Contingency plans; and</p>	Y	Team Deloitte exceeds this requirement by building an Implementation Support plan that is comprehensive in nature and that addresses sub-parts A thru I of this requirement. We begin development of the Implementation Support Plan early in the project's lifecycle and refine it based on meetings with each of CaWIN's 18 Counties. The plan is used to drive and coordinate Implementation Support activities, as well as to provide clear roles, responsibilities, and expectations across the diverse stakeholders involved in making each County's CaSAWS go-live successful.	5-232	5.5.4		
Del	16	Deliverable 11	<p>The Contractor shall provide an County Wave Implementation Complete Report for each county wave which certifies that all implementation support requirements have been met. The Contractor shall deliver a report no later than 60 days after the implementation completion of each County wave.</p>	Y	Team Deloitte meets this requirement by delivering County wave Implementation Complete Reports no later than 60 days after go-live for a wave. The report details all the activities conducted during the wave to support implementation, lessons learned, issues addressed, and critical factors to consider in future wave implementations.	5-252	5.5.5.6		
App	17	Approach	<p>The Contractor shall provide a detailed approach and description of all work to be performed in the following areas to satisfy or exceed the RFP requirements:</p> <p>a) Project Management;</p> <p>b) Business Process Reengineering;</p> <p>c) Organizational Change Management;</p> <p>d) Training Development and Delivery;</p> <p>e) Implementation and Conversion Support; and</p> <p>f) Additional as needed support.</p>	Y	Team Deloitte meets this requirement by providing our detailed approach to deliver the CaWIN Implementation Support Services as outlined in the RFP. We provide extensive detail about how we approach each of the core threads outlined in sub-points A through F in this requirement, including tools, methodologies, staff, and approaches for coordinating with the CaSAWS Consortium and CaWIN Counties throughout Section 5 of our RFP response.	5-2	5.0		
App	18	Approach	<p>The Contractor shall present each element of the Implementation Support Approach with include concise and informative descriptions of the required activities, related Deliverables, staffing, and key interaction with Consortium, County and/or Contractor staff.</p>	Y	Team Deloitte meets this requirement by providing a summary page at the end of each Section 5.X topic, highlighting the deliverables addressed in the section, key activities conducted, and interactions with CaSAWS Consortium and County staff.	5-2	5.0		
App	19	Approach	<p>The Contractor shall take into consideration County ancillary systems as a significant factor in the overall approach to the Implementation Support.</p>	Y	<p>Team Deloitte meets this requirement by keeping each CaWIN County's ancillary systems and their transition approach for CaSAWS at the forefront throughout the project. Within the County specific deliverables, including County business processes and County training plans we address how ancillary systems are either transitioned or utilized in conjunction with CaSAWS. We will work with each County to support the transition of their current ancillary systems into CaSAWS, or if maintaining, clarify how they will function in the new environment.</p> <p>Team Deloitte exceeds this requirement by conducting County Readiness Assessments prior to go-live, which include workers' understanding of how ancillary system usage will change in their County, and their readiness to adopt changes in the use of their ancillary systems. This enables Team Deloitte, along with CaSAWS leadership, County change coordinators and County leaders to adjust and further tailor County communications and/or training to address any concerns identified in the readiness assessment results.</p>	5-94	5.2.6.1		

App	20	Approach	The Contractor shall develop the strategic and tactical framework for defining, executing and managing the BPR effort and impact of changes resulting from and new and/or modified business processes.	Y	<p>Team Deloitte meets this requirement by developing a Business Process Framework Assessment to set the tactical and strategic framework for the BPR effort. This assessment builds on the previous work completed in the CalWIN Core and Ancillary Systems Analysis, and each County's preliminary ancillary system decisions identified in the RFP to use time effectively. It is important to do this with each County face-to-face at the beginning of the project, regardless of their scheduled wave, because it builds relationships, facilitates sequencing of County support given their unique needs, and makes sure we are bringing the right resources to each County throughout the project.</p> <p>Team Deloitte exceeds this requirement by recognizing the uniqueness of each CalWIN County in their operations, processes, and ancillary systems, as well as the population of clients they serve. We view our work with each County as 18 specific BPR projects, given the individuality of each County. Team Deloitte will assign dedicated teams to each County to build consistency, a strong understanding of operations, and a collaborative relationship. We will also provide centralized</p>	5-71	5.2.4.6		
App	21	Approach	The Contractor shall establish the approach to and guide changes in organizational structure and cultural changes across each County's impacted organizations.	Y	<p>Team Deloitte meets this requirement by using our Human-Centered Change (HCC) framework to develop an Organizational Change Management Plan and approach centered on the human element of the change. The plan will demonstrate empathy for the organizational and cultural changes County's will experience and will be tailored to specific changes at the County level.</p> <p>Team Deloitte exceeds this requirement by leveraging deep organizational experience and tools from our Cultural Transformation and Organizational Design practices to build those specific capabilities into the Organizational Change Management Plan.</p>	5-131	5.3.5		
App	22	Approach	The Contractor shall describe the overall staffing approach to the Implementation Support project team including location of FTEs. The Contractor must include an organization chart displaying the relationships of the Implementation Support team and include the relationships of the Implementation Support team to the CalSAWS Migration Project, Consortium and other Contractors.	Y	<p>Team Deloitte meets this requirement by describing our approach to staffing in Section 6.0. We have included an organizational chart for Team Deloitte, which provides details about how Team Deloitte is organized in Section 6.1.1.2. In addition, Section 6.3.1.2 describes how Team Deloitte is structured in relationship to CalSAWS Consortium stakeholders. In addition, we have provided a table that defines the location and time commitment of each key staff.</p> <p>Team Deloitte exceeds this requirement by providing a staff load chart of how many FTEs are allocated to each of the project teams.</p>	6-7	6.1.1.2		
App	23	Approach	The Contractor shall describe the criteria used to fill the Implementation Support Key Staff positions and should discuss the planned interaction between these individuals and Consortium's Project Staff in similar roles.	Y	<p>Team Deloitte meets this requirement by describing our approach to staffing in Section 6.0. We have defined the criteria Team Deloitte used to identify the right individuals to fill each key staff role. In addition, Section 6.3.1.2 describes how Team Deloitte is structured in relationship to CalSAWS Consortium stakeholders and how we interact with our counterparts.</p>	6-3	6.1		

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BPR	1	BPR	The Contractor shall work with each CalWIN County to gain a detailed understanding of the As-Is processes, considering ancillary systems, policies, and procedures to include, but not limited to, study existing documentation, including labor agreements, and conduct face-to-face meetings with various County staff and updating the As-Is business process documentation.	Y	Team Deloitte meets this requirement by working with the CalSAWS Consortium and individual Counties to gather, review, and assess the current documentation for both the CalSAWS system, core CalWIN and ancillary systems, policies, and procedures. Team Deloitte will assess the current state of documentation across the Counties and build a tailored approach to defining the As-Is state of the CalWIN system and each County based on documentation maturity. As part of documenting the As-Is processes, Team Deloitte will meet face-to-face with County staff and leadership to build baseline As-Is processes for the CalWIN system using Discovery Workshops, then develop updated County As-Is documentation through a vetted BPR Framework Approach, site visits and observations, and County-specific working sessions.	5-64	5.2.4.3		
BPR	2	BPR	The Contractor shall work with each County to: a) Discuss, review and assess the County's ancillary decisions to establish the County's framework for BPR and subsequent Training and OCM; b) Define, document and/ or update existing As-Is business process models to create a baseline for To-Be Business Processes; c) Identify areas of improvement, redundancies, inefficiencies, inconsistencies, and bottleneck points; d) Obtain County approval on recommended process changes or improvements and modify plans, as needed; and e) Include all As-Is Process documentation and recommendations as part of the county-specific BPR Plan Section.	Y	Team Deloitte meets and exceeds this requirement by developing a BPR Framework Assessment tool at the start of the project to use in kickoff meetings with each County. In meeting with each County, Team Deloitte assesses the current state of each County's As-Is documentation, the current ancillary systems and decisions, and current processes. Each County's BPR Framework will support Team Deloitte in building a tailored plan for defining, documenting, and updating existing CalWIN level and individual County As-Is business processes. Throughout the development of each County's As-Is processes and review in Discovery workshops, Team Deloitte maintains an Opportunity Matrix to identify areas of improvement, redundancy, inefficiency, inconsistency, and bottlenecks. This helps in development of To-Be processes to promote efficiency in the transition to CalSAWS. At the completion of the Discover phase of our approach, Team Deloitte works with each County to review all As-Is process models, make changes and updates as needed, and obtain final County approval prior to including the agreed upon As-Is documentation in the County-specific BPR Plan deliverable.	5-71 5-75 5-77	5.2.4.6 5.2.4.7 5.2.4.7		
BPR	3	BPR	The Contractor shall provide facilitation and consulting services for the 18 migrating CalWIN Counties to lead the following tasks: a) Identify the differences between the CalWIN As-Is and the CalSAWS To-Be business processes (e.g., document imaging or lobby management); b) Develop and document CalSAWS To-Be business practices including options for change; and c) Identify and document action steps to move the County from its As-Is business model to its To-Be business model.	Y	Team Deloitte meets this requirement by working first with current CalSAWS To-Be documentation to confirm our understanding of the future state, and assess the differences between the baseline CalWIN As-Is flows developed in the Discover phase. We then develop global baseline To-Be processes and review in workshops noting areas of difference and options for the CalWIN counties. In County-specific reviews, dedicated BPR teams work with each County to review proposed To-Be processes, assess changes and choices based on their operations and ancillary system decisions, and define the future state. Once tailored To-Be processes are approved by the CalSAWS Consortium and each County, Team Deloitte defines action steps on how to move to the To-Be business model in Business Process Implementation Road Maps and Support Plans. The Consortium and each County will have a tailored plan to implement their new business model allowing for the uniqueness of each County to be considered and potential risks to be identified early and mitigation strategies developed prior to implementation.	5-82 5-88 5-90	5.2.5.1 5.2.5.3 5.2.5.4		
BPR	4	BPR	The Contractor shall, as part of the As-Is/To-Be review, work with the 18 CalWIN Counties to review global and county-specific processes and procedures.	Y	Team Deloitte meets this requirement by coordinating and facilitating workshops throughout each phase of the BPR work. Starting in the Discover phase of our approach, the team hosts As-Is discovery workshops to review As-Is process flows for both CalWIN and County-specific documentation, in the Define phase the focus is on the To-Be processes for the transition to CalSAWS system and the approach for ancillary system decisions and, additionally, conducting a gap analysis between the CalWIN As-Is for each County and the CalSAWS To-Be. Our focus is on collaboration and tailoring—working with each County to review global and County-specific approaches throughout to develop implementable solutions.	5-82	5.2.5.1		
BPR	5	BPR	The Contractor shall provide Business Process Reengineering support to the CalWIN Counties for the transition of their ancillary systems that are transitioning into the core CalSAWS system, and also for their ancillary systems that are not transitioning into the core CalSAWS system.	Y	Team Deloitte meets this requirement by tailoring our approach to each County based on three categories of ancillary system: Opt-In Mandatory, Opt-In Optional, and Maintenance of Current County System. We work with each County during As-Is documentation to understand their current ancillary systems and into which category they fall. Then during To-Be process design we support each County in understanding options, making decisions, and documenting proposed To-Be processes. CalWIN Counties then have the opportunity to review processes for each of the ancillary systems and finalize the approach. Team Deloitte exceeds this requirement by developing, coordinating, and facilitating working groups for Opt-In Mandatory and Opt-In functionality for CalWIN counties to collaborate, share ideas, develop best practices, and work together where applicable to define to To-Be state.	5-85	5.2.5.1		
BPR	6	BPR	Where the automated conversion effort does not result in a successful profile setup for County security roles, as part of the To-Be business model, the Contractor shall assist the CalWIN Counties to complete the required profile setup for each County.	Y	Team Deloitte meets this requirement by collaborating with the DD&I vendor to understand the needed security profiles and roles to implement the To-Be process model and supporting CalWIN County staff with troubleshooting issues at go-live through the Implementation Support teams. Team Deloitte exceeds this requirement by supporting CalWIN County staff on-site with support of Implementation Support resources assigned to each County throughout the go-live phase and post implementation.	5-100	5.2.7.1		

BPR	7	BPR	The Contractor shall validate that the To-Be process/practice options they provide for both core and ancillary functions are compatible with CalSAWS functionality.	Y	<p>Team Deloitte meets this requirement by working closely with the CalSAWS DD&I vendor team to validate proposed processes are compatible with CalSAWS functionality. We set up a series of collaborative working sessions to review proposed processes with the DD&I vendor and address areas of concern or misalignment. If a proposed process is not implementable with the solution, Team Deloitte works with the DD&I vendor to understand options, propose these solutions to the CalWIN Consortium and individual Counties as applicable, and update To-Be processes with the change once approved.</p> <p>Team Deloitte exceeds this requirement as we have a strong history of successfully working with the CalSAWS DD&I vendor in another large, County-administered state to develop implementable To-Be processes in line with system functionality.</p>	5-87	5.2.5.2		
BPR	8	BPR	The Contractor shall include all To-Be Process documentation and recommendations as part of the county-Specific BPR Section.	Y	<p>Team Deloitte meets this requirement by working with each County to update the global baseline To-Be processes and tailoring them for the core and their ancillary systems. We review and finalize the To-Be processes with each County and, once approved, add their plan to the County-specific section of the Business Process <i>Reengineering Plan Deliverable</i>.</p>	5-86	5.2.5.1		

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OCM	1	OCM	The Contractor shall develop work products for the CalWIN Counties that are based on the following templates included in the OCM Plan. These work products shall include, but not limited to: a) County Decision Point Template; b) Change Readiness Checklist; c) Change Assessment Template; d) Change Assessment Tracking Template; e) Communication Roadmap Template; and f) Targeted Topic Template. The intent of these documents is to help the CalWIN Counties prepare for Migration.	Y	Team Deloitte meets this requirement by developing practical, actionable materials for CalWIN Counties to use during the transition to CalSAWS. These work products, such as the County Decision Point template, the Change Readiness Checklist, the Change Assessment and Tracking templates, and the Targeted Topic template provide Counties with concrete tools to support effective implementation of recommendations from the Change Readiness Assessment and the County Communication Plan, and to keep Counties on track in completing OCM activities and preparing all stakeholders for the transition. Team Deloitte exceeds this requirement by going beyond the required work products to developing a comprehensive suite of materials for County stakeholders to use during go-live, such as stakeholder personas, change journey maps, and ChangeScout's robust suite of reporting and tracking tools. Taken together, these materials will provide County stakeholders with the right information at the right time for a successful transition.	5-142	5.3.6.1		
OCM	2	OCM	The Contractor shall execute the Change Management activities. These activities shall include, but not limited to: a) Coordinating Change Readiness Assessments and reporting on progress; b) Monitoring County Decision Point progress; c) Executing communication roadmap activities; and d) Developing targeted topic material.	Y	Team Deloitte meets this requirement by developing an Organizational Change Management (OCM) Plan accounting for the entire scope of OCM activities, from assessing Counties' readiness for change, to implementing the County Communication Plan, and developing tailored materials for Counties to use to prepare stakeholders for go-live and beyond. Team Deloitte exceeds this requirement by taking a human-centered approach to OCM, placing CalWIN stakeholders at the center of all we do. OCM activities will be co-designed with stakeholders and tailored to Counties' specific needs, thus increasing end users' confidence in the transition and supporting high user adoption.	5-151	5.3.7		
OCM	3	OCM	The Contractor shall develop an approach, a timeline, and then conduct a baseline readiness assessment for each County. The Contractor shall: a) Provide and implement appropriate tools including, but not limited to, stakeholder assessments, change readiness analyses, and business result analyses; b) Conduct an assessment, by County, of change ability, resources, culture and concerns, and alignment to the transformation, the potential for changing roles and standardized processes; apply diagnostic tools to determine, recommend and prioritize each County's OCM needs; c) In developing a timeline, seek input from each County, and then provide a draft timeline for each County; d) Among Counties, identify opportunities to promote collaboration, assistance and cost-sharing efficiencies in OCM and readiness activities; and e) Meet with each County's leadership to understand the business outcomes essential for their success.	Y	Team Deloitte meets this requirement by developing a thorough Change Readiness Assessment, establishing metrics such as relative change levels and level of organization/process shift for each County. The Change Readiness Assessment results then inform subsequent OCM planning and activities, such as the OCM Plan and County Communication Plan. Team Deloitte exceeds this requirement by deploying our innovative ChangeScout tool to seamlessly monitor OCM activities in real time, allowing the CalWIN Consortium and Counties to nimbly respond to changing stakeholder needs throughout the transition. In addition, establishing the Implementation Readiness Network will also help facilitate additional levels of readiness analyses, business results and an ongoing pulse of stakeholders throughout the project.	5-115	5.3.4		
OCM	4	OCM	The Contractor shall, on an annual basis, assess and evaluate Training and organization development services against the Counties' strategic plans/annual goals, and program policy priorities. The effort will identify risks and opportunities for OCM at all levels and phases of the transformation.	Y	Team Deloitte meets this requirement by developing an OCM risk mitigation plan as part of the broader OCM Plan, aligning OCM activities during the transition to individual Counties' strategic plans and annual goals. We regularly update the risk mitigation plan based on evolving stakeholder needs and develop new tactics to address challenges identified by stakeholders. Team Deloitte exceeds this requirement by using ChangeScout and readiness assessment insights, combined with an iterative and dynamic approach to regularly review and refine the Change Management Plan in response to feedback from stakeholders and identified areas of concern to continuously improve our approach by capturing and addressing risks and opportunities for OCM at all levels and phases	5-156	5.3.8		

Requirements Info				Contractor Response				For Consortium Use Only	
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TR	1	Training	The Contractor shall work with Consortium Staff and CalWIN County staff to develop a Training schedule that includes early/advanced train-the-trainer sessions to County Trainers and staff development multiple early Training sessions of up to 25 attendees each. Early Training will begin according to the date specified in the CalWIN Master Training Plan.	Y	Team Deloitte meets this requirement by working with Consortium Staff and CalWIN County staff to lay out a schedule so learners attend just-in-time training, beginning with "dry run" practice presentations with County trainers and super users, followed by Train-the-Trainer (TTT) sessions. All sessions are presented to up to 25 participants each. The details of our training rollout waves, County schedules, facilities, logistics, and all aspects of classroom training delivery are developed in careful collaboration with Consortium and County leadership and stakeholders. The rollout schedule includes early/advanced TTT sessions for County Trainers and the development of super-user staff participants. Early training sessions, both "dry runs" of the initial draft of classroom training and TTT sessions, will train up to 25 participants. The dates for Early Training are specified in the Master Training Plan and County-specific Training Plans.	5-176 5-203 5-207	5.4.4 5.4.8.1 5.4.8.2		
TR	2	Training	The Contractor shall provide early Training to super users, coaches, help desk staff, and other designated County staff. The early Training shall include one-time migration WBTs, navigation, and other agreed upon Training.	Y	Team Deloitte meets this requirement by working with CalWIN County staff to lay out a training schedule that includes early training for super users, coaches, help desk staff, and other designated County staff for each training wave. During the Development phase, the Training Advisory Council and Deloitte Training teams perform "dry runs" of specific modules and courses to their fellow participants and project team members, County trainers, and select County personnel with roles as super users or coaches who can benefit from early/advanced training. Participating County personnel will be given additional training materials, such as WBTs covering migration/conversion, basic navigation of CalSAWS, and any other agreed upon training. These "dry runs" provide Team Deloitte with valuable feedback that may be used to modify training content and delivery. Materials are refined if needed, prior to use at the start of each wave.	5-176 5-207	5.4.4 5.4.8.2		
TR	3	Training	The Contractor shall improve and clarify Training materials during early Training delivery based on course evaluation results, lessons learned, surveys, and Deficiencies and/or systemic user learning issues identified by the Consortium and CalWIN Counties.	Y	Team Deloitte meets this requirement by reviewing draft training materials with the CalWIN Training Advisory Council and collecting feedback after early training deliveries using a Human-Centered Learning approach. Through evaluations, surveys, observations, and identified user issues, the training team updates the materials based on the information gathered. Improvements and clarifications are completed after the dry-run and first wave TTT sessions using the same process. Throughout the project, Team Deloitte works with Consortium and County stakeholders to improve and clarify training materials, from design through early training delivery, based on course evaluation results, lessons learned, surveys, and deficiencies and/or systemic user learning issues that are identified.	5-176 5-220	5.4.4 5.4.9.2		
TR	4	Training	The Contractor shall ensure the Training schedule has all users receiving Training prior to the deployment of CalSAWS in their respective locations.	Y	Team Deloitte meets this requirement by partnering with Consortium Staff and CalWIN County staff to lay out County-specific training schedules that enable all learners to complete their immersive learning journey in their respective locations, prior to their County's CalSAWS implementation date, and not more than 30 days before go-live. We use the Consortium's Learning Management System to facilitate signups for classroom sessions and track signups against the master list of employees in each County. This process will also allow for scheduling makeup training.	5-176 5-203 5-216	5.4.4 5.4.8.1 5.4.8.5		
TR	5	Training	The Contractor shall work with the Consortium Staff to have WBT modules available for general Training at least four weeks prior to go-live of the first wave.	Y	Team Deloitte meets this requirement by making existing CalSAWS WBTs available to County learners when their individual Learning Journeymaps are published in the LMS, several weeks prior to each County's training window, which begins approximately 4 to 8 weeks prior to their go-live date. Team Deloitte exceeds this requirement by updating Orientation WBTs with County-specific content, and embedding them and making them accessible through our respective Learning Journeymaps available through the LMS	5-190 5-196	5.4.6.2 5.4.7		
TR	6	Training	The Contractor shall produce registration reports for the CalWIN Counties to show: a) Who is registered for Training and for which module(s); and b) Who has not yet registered for Training.	Y	Team Deloitte meets this requirement by reporting on registration, progress, and outcomes of 30,000 County training participants at the individual, Group, and Project levels. We provide registration reports to the Consortium, CalWIN County Training Coordinators, and other parties designated during the creation of the CalWIN Counties' Master Training Plan. Reports provide details about who has completed training modules, who is registered for training modules, and students who are not yet registered. Team Deloitte exceeds this requirement by working with the Consortium/County stakeholders to identify and generate additional reports as needed. We provide progress reports for individual learners, supervisors, and leadership, aggregated at	5-213	5.4.8.4		

TR	7	Training	The Contractor shall work with the Consortium Staff to develop a Training schedule that ensures: a) Users must complete Training no more than four weeks prior to the deployment of the CalSAWS Software in their County, including make-up sessions; b) No more than thirty (30) percent (or an amount as agreed upon with the County) of staff per function (such as eligibility, employment services, fiscal, or support staff) is scheduled for Training at any one time; and c) Ensures that classes consist of students with similar job duties and reflects a user-specific focus, including user-specific case scenarios and innovative Training aides.	Y	Team Deloitte meets this requirement by creating the Master Training Plan and County-specific plans that describes the approach and timeline for CalSAWS training. Team Deloitte partners with Consortium Staff and CalWIN County staff to schedule learners in just-in-time training, either receiving training within 4 weeks of go-live, or returning to a Practice Lab the week prior to go-live (or both). Schedules and classroom capacity are planned so less than 30% of staff are away from the office. All training is based on job role, as illustrated in the sample curricula provided. The County training schedule is reviewed and refined by the Consortium and participating Counties before each training Wave. Team Deloitte exceeds this requirement by providing job-specific training through our Learning Journeymaps, accessible through the LMS. Each person in their respective job role can follow these Journeymaps, which range from Orientation WBTs that prepare learners for classroom training, to classroom learning in their specific role. These efforts are followed up with Webcasts, microlearnings, Job Aids, and support from Team Deloitte trainers and County trainers and super users.	5-176 5-203 5-216	5.4.4 5.4.8.1 5.4.8.5		
TR	8	Training	The Contractor shall produce webcasts and record WBTs for the targeted WBT topic areas. The Webcasts must allow the County staff to ask questions. The questions must be documented by topic area and be incorporated into a knowledge-based tool that is accessible to all CalWIN Counties and to the Consortium.	Y	Team Deloitte meets this requirement by supporting the County with live Webcasts. These Webcasts, conducted by Team Deloitte trainers to answer questions and clarify functionality, are coordinated with County training staff. We coordinate and present Webcasts with the OCM team for insights into County business processes. Up to three Webcasts may be scheduled per wave. They are recorded and available through the LMS, which is the knowledge-based tool currently in use by CalSAWS. Team Deloitte exceeds this requirement by incorporating Webcasts in every Learning Journey map, both prior to and as follow-up for go-live in each County. Webcasts are live events presented over an online conferencing platform (TBD), with support in each County location by County trainers, super users, and Implementation Readiness Network staff.	5-188 5-190 5-196	5.4.6.1 5.4.6.2 5.4.7		
TR	9	Training	The Contractor shall ensure that Training resources, including trainers, facilities, and equipment, shall be provided at a level to support Training quality and Schedule requirements as specified in the approved CalSAWS Training Plan; and	Y	Team Deloitte meets this requirement with experienced training staff, facilities, and equipment to be certified with the County staff, and scheduling and logistics per agreed-on planning at both the Consortium and County levels. Team Deloitte exceeds this requirement by providing a training team of the highest quality and experience, veterans of several previous statewide and County-level implementation projects, including SAWS implementations going back to ISAWS. This long experience with logistics for statewide training rollouts, including CCSAS (child support), C-IV, C-IV Migration, and the current implementation of eWIC in 83 local jurisdictions.	5-207 5-210	5.4.8.2 5.4.8.3		
TR	10	Training	The Contractor shall design and develop Training materials collaboratively with the Consortium Staff and closely coordinate the completion of materials with the CalWIN Master Training Plan.	Y	Team Deloitte meets this requirement by working closely with Consortium and County stakeholders to understand how County workers do their jobs, and the business processes and related systems that drive service delivery in each County department. Team Deloitte exceeds this requirement through our Training Needs Assessment process, which aligns training materials with County staff job roles and responsibilities, and is documented in each County-specific Training Plan. We work closely with BPR and OCM teams in the Analysis stage to understand how County workers do their jobs and the business processes and related systems that drive service delivery in each County department. Our review process involves Consortium and County staff at each major step in training development.	5-166 5-187 5-196	5.4.1 5.4.6 5.4.7		
TR	11	Training	The Contractor shall maintain the Training Materials through the completion of the wave deployment of all 18 CalWIN Counties.	Y	Team Deloitte meets this requirement by maintaining training materials throughout the project. Any updates made to materials, once approved, are hosted in and continuously available from the LMS. All required changes are submitted for review and approval, using the same processes established for training development. We communicate and notify the learner population and County leadership when updates are available, using the communication capabilities of the LMS.	5-201 5-220	5.4.7.1 5.4.9.2		
TR	12	Training	The Contractor shall develop specific curricula for each user type, including but not limited to, program-specific workers, Administrative and Management Staff, Fair Hearings Staff as well as outside entities such as Child Support and WTW activity providers and local partner entities such as application assisters. The Contractor shall work with the Consortium Staff and CalWIN Counties to identify user types as classifications are different in each County.	Y	Team Deloitte meets this requirement by developing a curriculum for each County job role, per County profiles in Attachment M, and as illustrated by our sample curricula in Section 5.4.6.3. Team Deloitte exceeds this requirement by employing Human-Centered Change (HCC) principles to build a strong understanding of the behavior of the users impacted by the change when developing our Master Training plan. We employ creative interview tactics and exercises to inform the Training Needs Assessment and training scenarios. We work closely with Consortium and County stakeholders as well as BPR and OCM teams in the Analysis stage to understand how County workers do their jobs, and the business processes and related systems that drive service delivery in each County department. The result is what we call Human-Centered Learning, which makes sure training focuses foremost on the individual and their work.	5-188 5-192	5.4.6.1 5.4.6.4		
TR	13	Training	The Contractor shall ensure that all Training materials shall address the user-related processes and procedures contained in the CalWIN Conversion Plan (e.g., data cleansing, default values from conversion).	Y	Team Deloitte meets this requirement by creating training materials that provide step-by-step conversion instructions. Conversion is presented as classroom training that provides vital information such as how to prepare case data for conversion. Classroom training is complemented by a Conversion WBT and leverages the Conversion Playbook produced by the Implementation team. All conversion training materials are designed and developed from the user's perspective, so materials are clear and easy to understand for non-technical staff.	5-201	5.4.7.2		
TR	14	Training	The Contractor shall deliver all updated Job Aids and Supporting Training Aids in accordance with the approved CalWIN Master Training Plan.	Y	Team Deloitte meets this requirement by incorporating Job Aids, microlearning videos, and WBTs in the individualized Learning Journey map, including the 120 Job Aids from the CalSAWS existing library, any updates to those Job Aids, or new ones developed for the project or for County-specific business processes, per the Master Training Plan or County-specific Training Plans.	5-181 5-186 5-190	5.4.5.4 5.4.5.5 5.4.6.2		

TR	15	Training	The Contractor shall provide up to date WBT modules, using existing CalSAWS WBTs as a starting point. WBTs shall be available for County use according to the date in the approved CalWIN Master Training Plan. Once approved, WBTs shall be available for continuous County use.	Y	Team Deloitte meets this requirement by updating the Orientation and General Eligibility WBTs for the CalWIN training audience. Additional WBT courses may be constructed by Team Deloitte. This decision will be made in planning. All updated and new WBTs are uploaded and maintained in the LMS for continuous County use.	5-186	5.4.5.5		
TR	16	Training	The Contractor shall utilize the Consortium's Learning Management System (LMS) product, Meridian SaaS Cloud with Ad Hoc Reporting, ensuring that all CalWIN county user profiles are transferred and enabled.	Y	Team Deloitte exceeds this requirement by leveraging our long experience with Learning Management Systems generally and specifically with the Meridian LMS, having managed LMS configurations, loading, and management on several previous projects, including using the Meridian SaaS Cloud LMS. Our immersive Learning Journeymaps for each CalWIN/CalSAWS job role will be integrated with the LMS to provide a fun, engaging, and highly accessible vehicle for navigating the CalSAWS learning experience.	5-190 5-203 5-213	5.4.6.2 5.4.8.1 5.4.8.4		
TR	17	Training	The Contractor shall provide both first time and refresher training for County Staff on the LMS tool. This tool and plan must allow for, but not be limited to: a) Management of the Training schedule and curricula; b) Enrollment of trainees; c) Allow supervisors and managers to monitor staff progress; d) Generation of agreed upon reports with the Consortium Staff; e) Automatic generation of email reminders to trainees/users about upcoming Trainings; f) Documents of LMS functions used by County Staff; and g) Provide the Counties with a plan to track ergonomic needs and ADA accommodation of attendees which will allow Counties to provide adequate resources.	Y	Team Deloitte meets this requirement by training CalWIN County Training Coordinators on how to use the CalSAWS LMS. LMS training occurs before publishing training schedules for each training window. We conduct regular training as well as follow-up sessions with CalWIN Training Coordinators to prepare and guide them through managing schedules, user registration, course enrollment, and automatic email reminders. We also train County Training Coordinators on how to manage ergonomic needs and ADA accommodation of attendees. We will work closely with the Counties to make sure that adequate resources are provided. We will create an instructional guide on how to administer and manage the LMS, with screenshots and step-by-step instructions.	5-213	5.4.8.4		
TR	18	Training	The Contractor shall execute the following three (3) tasks and develop three (3) corresponding reports from the LMS tool: a) a load of all Training courses; b) perform a one-time load of users into the LMS extracted from the CalWIN Production database; and c) support the CalWIN Training Coordinators and their use of the LMS.	Y	Team Deloitte meets this requirement by loading all training courses and users to the LMS, then integrating Journeymaps that capture the courses and training materials for each job role. We provide ongoing support for County training staff for their use of the LMS and support LMS users as they access their training experiences.	5-213	5.4.8.4		
TR	19	Training	The Contractor shall prepare for Training delivery by collaborating with the CalSAWS Consortium Staff, CalWIN Training Coordinators, and In-County Training support staff to evaluate the Training needs of users in the 18 CalWIN Counties. Users will be grouped by classification and classifications will be mapped to courses.	Y	Team Deloitte meets this requirement by collaborating with CalSAWS Consortium Staff, CalWIN Training Coordinators, and In-County Training support staff, along with our OCM and BPR teams, to create the Training Needs Assessment as an input for the Training Plan. We leverage BPR Discovery Workshops, Gap Analysis work, and defined To-Be processes to understand the training needs of each job role and identify business processes specific to the 18 CalWIN Counties. Using this information, we apply Human-Centered Learning practices to customize training materials for business processes and realistic scenarios. County-specific training focuses on combining system training with to-be processes, and must also incorporate opt-in mandatory, opt-in optional, and current ancillary County systems.	5-178	5.4.5.2		
TR	20	Training	The Contractor shall assist the Counties to prepare for Training activities, Training dry runs, early Training activities, and support Training delivery. The Contractor shall provide an appropriate number of Training support staff for the Counties.	Y	Team Deloitte meets this requirement by providing training developers and trainers of the highest quality and experience to prepare the CalSAWS training program, develop classroom courses and materials, and prepare County trainers for delivering learning to the CalWIN County staff. These same experienced staff are tasked with presenting initial "dry runs" of training and the TTI program, with two instructors per class of up to 25. Team Deloitte prepares a Trainer toolkit as part of the materials provided to County trainers. This toolkit is used during TTI sessions before each module and course.	5-207	5.4.8.2		
TR	21	Training	The Contractor shall deliver the Training site and equipment certifications of readiness one (1) month in advance of the start of any Training in a site in accordance with the approved CalWIN Master Training Plan. The Contractor shall provide ADA compliant Training facilities and equipment to support the Counties Training requirements.	Y	Team Deloitte meets this requirement by applying a CalSAWS Classroom Certification document with a checklist and floor plan for room setup: ADA-compliant entry, restrooms, furniture, and equipment; and a testing protocol to ensure all equipment is working properly (and that there is connectivity to the training environment and LMS). The CalSAWS Classroom Certification checklist will be completed prior to the Consortium's inspection of the training site and classrooms one month prior to the start of training.	5-210	5.4.8.3		
TR	22	Training	The Contractor shall provide Training resources, including trainers, facilities, and equipment, at a level that supports high quality Training and meets schedule requirements as specified in the CalWIN Master Training Plan.	Y	Team Deloitte meets this requirement by providing training developers and trainers of the highest quality and experience to prepare the CalSAWS training program, develop classroom courses and materials, and prepare County trainers for delivering learning to the CalWIN County staff. Our long experience with logistics for statewide training rollouts, including CCSAS (child support), C-IV, C-IV Migration, and the current implementation of eWIC in 83 local agencies across the state, is unmatched, and we will provide a comfortable, ADA-compliant and accessible environment for all.	5-207 5-210	5.4.8.2 5.4.8.3		
TR	23	Training	The Contractor shall work with both CalSAWS Project Training staff and County Training staff throughout the CalSAWS Training program development life cycle. The Contractor shall collaborate with the CalSAWS Consortium and CalWIN Counties by soliciting and incorporating input on the CalWIN Master Training Plan, methodologies, sites, and Training materials. The Contractor shall incorporate the input provided by the CalWIN Counties and the CalSAWS Consortium Staff.	Y	Team Deloitte meets this requirement by collaborating with CalSAWS Consortium and County training staff throughout the project, from the Training Needs Assessment inputs to the Master Training Plan, training material design and development, and with scheduling, facilities, logistics, and management of the training program through the LMS. Input and feedback for all aspects of training development and delivery are solicited from Consortium and County stakeholders at every stage and step.	5-178 5-181 5-186	5.4.5.1 5.4.5.4 5.4.5.5		
TR	24	Training	The Contractor shall provide the Train-the-Trainer approach for all CalWIN Counties Training staff. The Contractor shall be responsible for the delivery of training with the assistance of the CalWIN Counties throughout Training delivery. The Contractor shall train the County trainers to deliver the CalSAWS Training program including the use of all Training materials and supporting Training aids.	Y	Team Deloitte meets this requirement by supporting County Training staff with dry-runs/early training and with TTI presentations. Each County can choose how they prefer Team Deloitte to contribute to the end-user training effort: by teaching the classes, co-teaching the classes with County Trainers, or supporting the County Trainers as they deliver training to CalSAWS users. During the creation of the County-specific Training Plan, the County's preference for training delivery is confirmed and the County Training Plan is built on their desired approach.	5-190 5-207	5.4.7 5.4.8.2		

TR	25	Training	The Contractor shall focus End User Training on hands-on CalSAWS System usage to enable the users to accomplish their day-to-day activities on CalSAWS.	Y	<p>Team Deloitte meets this requirement by introducing the scope and functionality of CalSAWS through WBT modules to prepare learners for classroom training. Then during instructor-led training, we maximize their access to the CalSAWS training environment so they can see, hear, and experience lessons in CalSAWS functionality, ask questions of instructors, interact with their fellow participants, and practice training scenarios that were built in partnership with County trainers and based on actual case examples.</p> <p>Team Deloitte exceeds this requirement by creating Personas and scenarios based on real challenges and problems that capture and make use of the discoveries made by the work of our BPR and OCM Teams in collaboration with their Consortium and CalWIN County stakeholders. By distilling our understanding of existing and new business processes, combined with insights into County job roles and responsibilities, we create scenarios that can be explored and discussed, first in collaboration and review with County training stakeholders, and later in the classroom with County staff, physically simulating the differences between old and new business processes. These are all opportunities for further refining the understanding by all participants of changed business processes and systems, and their relation to policy and practice in everyday work.</p>	5-187 5-203	5.4.6 5.4.8.1		
TR	26	Training	The Contractor shall coordinate with the Consortium and the CalWIN Counties to secure Training sites within 20 miles of the offices for which the Training will be conducted and prepare Training sites with necessary equipment, software, devices, furniture, restrooms, break rooms, parking and accommodate special requests by trainees to facilitate safe and comfortable learning.	Y	<p>Team Deloitte meets this requirement by setting up, furnishing, and equipping ADA-compliant classrooms, including ergonomic desks and chairs, computer hardware, internet connectivity, audio-visual equipment, whiteboards, and flipcharts. The training classrooms are set up to be conducive to intensive learning. Prior to deployment of a CalSAWS training wave, communication from Team Deloitte will inform County personnel and training staff of all pertinent information about the classroom site, including Site floor plan, parking, restroom locations, security process for entering and exiting the site, and site point of contact/emergency contact. If a County does not have available space to meet the need, we search for facilities to lease that are within 20 miles or less of the County offices.</p>	5-210	5.4.8.3		
TR	27	Training	The Contractor shall secure Training Sites that comply with ADA standards and be developed in accordance with sound ergonomic principles and guidelines.	Y	<p>Team Deloitte meets this requirement by setting up, furnishing, and equipping ADA-compliant classrooms, including ergonomic desks and chairs, computer hardware, internet connectivity, audio-visual equipment, whiteboards, and flipcharts. The training classrooms are set up to be conducive to intensive learning. Any sites considered will comply with ADA standards and be set up to use sound ergonomic principles and guidelines.</p>	5-210	5.4.8.3		
TR	28	Training	The Contractor shall secure Training Sites that shall be in accordance with the Training schedule to support the CalWIN Counties with consideration toward minimizing extended travel by County staff. If a designated Training Site is in a County Welfare Department office, it shall be set up in a way to ensure that staff not attending Training are able to continue with their normal, ongoing work.	Y	<p>Team Deloitte meets this requirement by leasing facilities with parking availability, adequate restrooms, and participant safety/security in mind. Every effort will be made to select training facilities that minimize travel time for County staff. The classrooms should accommodate no more than 25 trainees in each with two trainers in the room, for a trainer-to-student ratio of 1 to 12.5.</p> <p>If County classrooms are available for CalSAWS training, Team Deloitte will set up classrooms in a way that does not interfere with normal, ongoing work in the department. If any tenant improvements are required to the leased facilities, we will schedule and oversee the work within the required timelines. We will schedule and supervise the installation and de-installation of furniture and equipment, and will manage the move from location to location, wave to wave.</p>	5-210	5.4.8.3		
TR	29	Training	The Contractor shall secure and prepare each Training site in a timeframe that allows the Consortium Staff to inspect the Training site no less than two weeks before Training begins. If the Training site meets requirements, it shall be certified as ready for use. If the site does not meet the CalWIN Training site requirements, the Contractor has two weeks to resolve the issue(s).	Y	<p>Team Deloitte meets this requirement by providing the CalSAWS Classroom Certification checklist one month prior to the start of training. Consortium staff may then inspect the site two weeks or more prior to training delivery, and ask Team Deloitte to resolve any issues.</p>	5-210	5.4.8.3		
TR	30	Training	The Contractor shall develop, administer, and evaluate, in collaboration with the CalWIN Counties, post-Training class evaluation surveys. The survey results shall be used to update Training materials and/or approach for future classes based on lessons learned. The results of the surveys shall be provided to the Consortium Staff within one (1) week of the end of the class.	Y	<p>Team Deloitte meets this requirement by gathering and reporting on all classroom and WBT survey evaluations on a weekly basis after training delivery begins, providing all reports to Consortium and County staff within a week of each classroom delivery. Evaluation/survey results are used to update training materials as needed, modify classroom presentations, or adjust our overall approach to upcoming training waves based on what we hear as feedback from our learners.</p>	5-219	5.4.9		
TR	31	Training	The Contractor shall, for the purpose of planning Training scheduling and delivering, take into consideration the wave approach migration schedule, the Counties' geographical diversity, the number of courses to be delivered, and each County's travel policies.	Y	<p>Team Deloitte meets this requirement by working collaboratively with the Consortium and Counties to create a realistic, comprehensive plan for training. Customized plans consider the needs of each CalWIN County and the logistics of rolling out training in six waves across the state to geographically dispersed County offices that each have different constraints and travel policies.</p> <p>Early in the project, we collaborate with the Consortium and County trainers to understand training requirements for the system overall and for any County-specific challenges and needs we should consider. Together we develop and refine a detailed Master Training Plan through a rigorous review process. The Master Training Plan is used as a baseline to develop customized versions of the Plan for each of the</p>	5-181 5-216	5.4.5.4 5.4.8.5		
TR	32	Training	The Contractor shall involve each County in the Training scheduling process and what type of Training each position-type receives. The Contractor shall work with each County to finalize the Training plan for its County according to their staff members' job functions and their County's policies and procedures.	Y	<p>Team Deloitte meets this requirement by working with the Consortium, the TAC, and training representatives from each CalWIN County to develop, review, and approve their specific training plan. Understanding the training audience and system functions, we can delineate the curriculum of courses and training materials that relate to specific County staff roles and responsibilities. From the Analysis phase on, the Training Curriculum for the Consortium and CalWIN Counties guides the assignments and work products for training. County-specific curricula, based on the overall CalSAWS curriculum but customized for each County, are finalized in the</p>	5-186 5-191	5.4.5.5 5.4.6.3		

TR	33	Training	The Contractor shall be responsible for creating and maintaining Training data in the CalSAWS Training development and production environment(s) dedicated to CalWIN Training support.	Y	Team Deloitte meets this requirement by loading the training environment with simulated cases (master training data) for training purposes. A clear and well-managed refresh schedule is implemented. Separate security and role guidelines and monitoring are also required. Preparing these environments, especially the Training Production Environment and its associated refresh schedule, is a critical logistical activity prior to the start of TTT sessions and County training rollout. This data refresh process enables CalSAWS learners to train and practice with high-quality, accurate data, helping workers learn their jobs more quickly and reducing time to access the environment .	5-218	5.4.8.6		
TR	34	Training	The Contractor shall work with the DD&I contractor, Consortium staff and other contractors as necessary to obtain conversion-specific information required to develop corresponding Training materials for non-technical staff, including all users involved in the conversion process. These conversion related Training materials must be easy for non-technical staff to understand and act upon to complete conversion activities. Prior to Training delivery in the CalWIN Counties, the Contractor must test and conduct dry runs of the conversion-related Training materials and apply appropriate revisions.	Y	Team Deloitte meets this requirement by meeting with the DD&I contractor, the Implementation and Conversion Support team, and any other contractor teams involved in the conversion effort to fully understand what non-technical staff need to know about the conversion process, as well as to study all available related technical and design materials. Armed with this information, we create training materials that provide step-by-step conversion instructions. Conversion is presented as classroom training that provides vital information such as how to prepare case data for conversion. The classroom training is complemented by a Conversion WBT and leverages the Conversion Playbook produced by the Implementation team. All conversion training materials are designed and developed from the user's perspective so materials are clear and easy to understand for non-technical staff. Prior to delivering conversion training, Team Deloitte will test the materials and conversion-related data in a dry run, and make any necessary improvements.	5-201	5.4.7.2		

CalWIN Training, OCM and Implementation Support Requirements			Contractor Response			For Consortium Use Only	
Requirement Description	Requirement Met (Y/N)	Proposal Description	Page #	Section #	REC Met	Reviewer Comment	
The Contractor shall conduct Go-Live Readiness meetings for approval prior to each wave.	Y	<p>Team Deloitte meets this requirement by conducting a sequence of go-live readiness meetings that begin 4 weeks before each go live, utilizing a series of more than 30 quantifiable metrics (e.g., % of staff trained, % of open high defects) to determine readiness to go-live across technology, training, communication, and conversion. The meetings are initially bi-weekly and increase in frequency as the wave nears go-live. The same milestones are used for each County to provide similarity in readiness assessment.</p> <p>Team Deloitte exceeds this requirement by publishing the readiness reports weekly to the Consortium for transparent access to where each County is trending in terms of readiness. We accelerate milestone development using proven artifacts from</p>	5-235	5.5.4.2			
<p>The Contractor shall prepare for, conduct and facilitate lessons learned sessions at the conclusion of each implementation wave and prepare a Lessons Learned Report based on those sessions. The sessions will include, but not be limited to the following:</p> <p>a) Preparation of the session agenda;</p> <p>b) Include a cross-section of County staff to participate in the session as determined by the CalSAWS Consortium;</p> <p>c) Capture:</p> <ul style="list-style-type: none"> - Successes that happened during or because of the implementation; - Unintended outcomes that occurred during or because of the implementation; - Other considerations that, in retrospect, may have been handled differently for better outcomes; and 	Y	<p>Team Deloitte meets this requirement by conducting both County-specific lessons learned sessions and a cross-wave lessons learned session that includes Consortium staff, representation from each County in the wave, and any other interested CalWIN stakeholders. These sessions are conducted within 30-45 days after the go-live.</p> <p>Team Deloitte exceeds this requirement by utilizing a structured process for reviewing the results of the wave implementation that spans technology, infrastructure, communication, training, and post-go-live support. We maintain a master list of lessons learned that is fed into future wave County-specific implementation plans.</p>	5-252	5.5.5.6			
For each County, the Contractor shall plan for and provide 30 days of readiness preparation and pre-implementation support.	Y	<p>Team Deloitte meets this requirement by beginning readiness planning activities well over 30 days prior to go-live. Our preparation approach begins with planning with counties over six months before go-live, delineating checklists and key preparation tasks that need to be completed leading up to go-live for a county.</p> <p>Team Deloitte exceeds this requirement by bringing a proven readiness assessment report, which is a comprehensive validation of state training efforts, office readiness, infrastructure and load capacity, and conversion effort and business process realignment. The status of each of these areas, as well as confirmation that deliverables have been reviewed and accepted, is included in the final readiness assessment. Our readiness preparation and pre-implementation support begin six months prior to go-live.</p>	5-235	5.5.4.2			
For each County, the Contractor shall plan for and provide 60 days of post-implementation support.	Y	<p>Team Deloitte meets this requirement by developing and delivering at least 60 days of post-implementation support through deploying implementation support across CalWIN counties, standing up command center check-ins, and completing implementation support activities identified in the pre-implementation readiness checklists.</p> <p>Team Deloitte exceeds this requirement by bringing innovative solutions to data collection of implementation support activities in order to support CalWIN with data-driven lessons learned. Team Deloitte also brings innovative communications solutions to provide enhanced levels of connectivity among site support, end users,</p>	5-244	5.5.5			
The Contractor shall work and collaborate closely with the Contractor's managers, leads and teams in support of the full-range of migration services -- BPR, OCM, and Training -- in planning and preparing for cut-over. The BPR, OCM and Training activities will culminate in County readiness for implementation. The Contractor shall work closely with the Consortium and Counties to plan for and deliver the pre and post implementation services.	Y	<p>Team Deloitte meets this requirement by creating readiness checklists starting no less than 30 days prior to go-live for each County; these tasks will be performed prior to each wave in each County.</p> <p>Team Deloitte exceeds this requirement by including sections in our checklist such as General Information, Training, Business Process, Technology and Infrastructure, Conversion, and Communications. These monitoring criteria are measurable, actionable, and provide clear deadlines for completion. The Readiness Checklists will guide Go-Live Readiness meetings with CalWIN leadership prior to each wave's</p>	5-232	5.5.4			

The Contractor shall complete the transition from the CalWIN decentralized County-based support model to the CalSAWS regional structure for governance and ongoing system support.	Y	<p>Team Deloitte meets this requirement by conducting an analysis of how each CalWIN County currently accesses ongoing system support and matching that to how it should be done for CalSAWS. As part of our implementation readiness checklist and training approach, the new method(s) for accessing the ongoing system are publicized to county staff. Lastly, we work closely with the CalSAWS consortium to determine which levels of governance are not in place and build into our workplan the necessary OCM activities to put them in place as each wave transitions to CalSAWS.</p> <p>Team Deloitte exceeds this requirement by utilizing business process and OCM insights collected throughout each wave of CalWIN County transitions to CalSAWS. For example, post-implementation support provided through our recommended Command Center approach creates organizational structures and channels for CalWIN staff to utilize for ongoing system support prior to the actual transition.</p>	5-253	5.5.5.7		
<p>The Contractor shall meet regularly, and work closely with, the Conversion Team to facilitate information sharing and communication of issues and items, such as, but not limited to:</p> <p>a) CalSAWS target fields must be defaulted to a value because no source data exists in CalWIN;</p> <p>b) CalSAWS target fields must be derived from multiple fields in CalWIN;</p> <p>c) Specific data issues that will cause a conversion failure, which may affect a case, an individual, or data associated with a case or an individual; and</p> <p>d) Data cleansing items for which instructions to the Counties must be developed and communicated to improve the conversion results.</p>	Y	<p>Team Deloitte meets this requirement by engaging the CalSAWS DD&J vendor early to understand what actions are required for County staff to take before and after go-live in relation to case data updates to facilitate data conversion. Team Deloitte works with County managers to update the appropriate implementation checklists for conversion impacts and utilizes communication and tracking mechanisms to effectively measure conversion pre- and post-go-live.</p> <p>Team Deloitte exceeds this requirement by encapsulating conversion requirements in a Conversion Playbook that includes sections addressing potential pitfalls when working with converted data such as data that fails conversion, which system to use during the rollout period, and benefit-matching criteria.</p>	5-241	5.5.4.5		