

Helping the  
Consortium *color* outside  
the lines

**Volume 3B M&E Confidential Materials for:  
Volume 1B, Part 2 M&E Business Proposal**

Deloitte's Response to CalSAWS M&O Services RFP #01-2022

January 18, 2023



Deloitte Consulting LLP  
Suite 1800  
980 9th Street  
Sacramento, CA 95814  
USA

January 13, 2023

Tel: +1 (916) 288-3100  
Fax: +1 (866) 719-2934  
[www.deloitte.com](http://www.deloitte.com)

CalSAWS M&O Services RFP  
Attention: Tom Hartman  
11290 Pyrites Way  
Suites 150 and 175  
Rancho Cordova, CA 95670

**RE: CalSAWS M&O Services RFP #01-2022**

***Supplemental Transmittal Letter to Letter dated January 4, 2023***

Dear Mr. Hartman,

The Consortium will soon be able to use technology to support Californians not just in one County, or in one Consortium, but across the entire State. It's the "The Power of 58." We have been by the Consortium's side for two years and are impressed by its accomplishments. We are also aware that the CalSAWS base solution is 15 years old, with significant technical debt, and the Consortium has had to defer much-needed changes during the CalWIN migration.

We want to help the Consortium color outside the lines so it can meet more County needs faster and establish itself as a nationwide leader in HHS innovation and digital service delivery. This includes re-imagined vendor collaboration, a freed-up budget, and the flexibility to support any direction the Consortium needs to go.

Deloitte Consulting LLP ("Deloitte") is pleased to submit our proposal to the CalSAWS Consortium and be the team that helps you mature your planning, governance, and software development processes.

Per the requirements of your RFP, we have provided the information requested in the remainder of this transmittal letter.

Yours sincerely,

A handwritten signature in blue ink that reads "Rachel Frey". The signature is fluid and cursive, with a large loop at the end.

**Rachel Frey**

Principal, Deloitte Consulting LLP

## RFP Response Requirements

### RFP Reference: 6.3.8.1 Transmittal Letter

The Proposal shall contain a transmittal letter to the Consortium. The Transmittal Letter shall include the following:

1. The Contractor's business name and address;
2. The nature of the Contractor's business organization, such as: corporation, partnership or other entity;
3. The Contractor's Primary Business Contact including name, title, phone number and email;
4. 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;
5. A reference to all RFP amendments received by the Contractor; if none have been received, a statement to that effect must be included;
6. A statement indicating whether the Contractor has had any contracts terminated within the last five (5) 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;
7. 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 (5) 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;
8. A description of any Prime Contractor or Subcontractor formal relationships with the Consortium or Counties over the last twenty-four (24) months;
9. 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 Counties. If no such contracts exist, so declare;
10. A description of how the Contractor will address any potential conflicts between the Work underway on current contracts and the M&E and/or Infrastructure Services;
  - A statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period, which must be at least twelve (12) months from the Proposal due date specified in Section 1 or through the end of contract negotiations whichever is later;
  - A description of Contractor's corporate commitment to diversity, equity, and inclusion in hiring and contracting, including a description of Contractor's efforts to enter into subcontracts on the Project with qualified Minority and MWBEs and/or DVBES; and
  - The 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.

Price information must not be included in the transmittal letter.

Our response to each of these requirements is below:

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**Requirement**

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The Contractor's business name and address;

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Deloitte Consulting LLP  
980 9<sup>th</sup> Street, Suite 1800  
Sacramento, CA 95814

Deloitte's headquarters is located at 30 Rockefeller Plaza, New York, NY 10112.

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**Requirement**

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The nature of the Contractor's business organization, such as: corporation, partnership or other entity;

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Deloitte Consulting LLP is a Limited Liability Partnership.

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**Requirement**

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The Contractor's Primary Business Contact including name, title, phone number and email;

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Rachel Frey  
Principal  
  
[rfrey@deloitte.com](mailto:rfrey@deloitte.com)

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**Requirement**

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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;

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Neither Deloitte Consulting LLP, our proposed subcontractors, nor any of our principals are presently debarred, suspended, proposed for debarment, declared ineligible, or are voluntarily excluded from participation in this transaction by any Federal, State, or County department or agency.



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**Requirement**

A reference to all RFP amendments received by the Contractor; if none have been received, a statement to that effect must be included;

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Deloitte Consulting LLP acknowledges receipt of the following RFP amendments:

- Amendment 1, posted July 27, 2022
- Amendment 2, posted September 1, 2022
- Amendment 3, posted October 4, 2022
- Amendment 4, posted October 18, 2022
- Amendment 5, posted October 31, 2022
- Amendment 6, posted November 23, 2022
- Amendment 7, posted December 1, 2022
- Amendment 8, posted December 8, 2022
- Amendment 9, posted December 19, 2022

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**Requirement**

A statement indicating whether the Contractor has had any contracts terminated within the last five (5) 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;

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Deloitte Consulting LLP has had no terminations for default for performance in our government practice over the past five (5) years.

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**Requirement**

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 (5) 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;

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Deloitte Consulting LLP, as a leading provider of consulting services, is routinely involved in complex consulting projects, often involving large-scale systems implementations and multiple service providers. We are justifiably proud of our record of client satisfaction; however, projects do occasionally give rise to disagreements over contract requirements, and we are occasionally, though rarely, involved in litigation pertaining to our consulting services. Such matters will not affect our ability to provide consulting services, nor will they affect our ability to serve the Consortium in connection with this proposed engagement or to continue serving the State of California as we have continually for over 50 years.

### Requirements

A description of any Prime Contractor or Subcontractor formal relationships with the Consortium or Counties over the last twenty-four (24) months;

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 Counties. If no such contracts exist, so declare;

Deloitte's formal Consortium and County relationship details for the past 24 months are included in Table 1-1 below, followed by responses from our subcontractors in Tables 1-2 and 1-3.

Contract Number	Title	Contract Period	Project Description
<b>CalSAWS Consortium</b>			
<b>2002954.1 14448-005</b>	CalSAWS CalWIN Implementation Services (ISS)	12/09/2020 – 01/31/2024	Implementation Support Services for the CalWIN Counties transition to the CalSAWS system
<b>1958624.1</b>	CalSAWS Portal/Mobile App (BenefitsCal)	08/01/2020 – 12/31/2024	Develop the Statewide Portal/Mobile Application for CalSAWS
<b>City &amp; County of San Francisco</b>			
<b>1000013297</b>	CCSF Comprehensive Annual Financial Report (CAFR), Phase II	01/25/2019 – 01/24/2022	Assistance in preparation Comprehensive Annual Financial Report (CAFR)
<b>1000014040</b>	CCSF CAFR	06/06/2019 – 06/05/2023	Implementation of financial system and accounting requirements services
<b>1000014039</b>	CCSF EPIC Project	06/10/2019 – 06/09/2023	Implementation of new systems services
<b>1000017994</b>	CCSF GASB 84 & 87	06/01/2020 – 06/30/2025	Implementation of financial system and accounting requirements services
<b>1000018438</b>	CCSF MBU & FSP Func Adopt & Enh	07/01/2020 – 06/30/2025	Implementation of financial system and accounting requirements services
<b>1000023976</b>	CCSF PORT GASB 87 Lease Abstraction	01/10/2022 – 08/01/2023	Professional services regarding implementation of Government Accounting Standards Board statement number 87

Contract Number	Title	Contract Period	Project Description
<b>PO-23328</b>	CCSF Project Marlin_21 Tech PO 23328 0000538230	07/19/2021 – 09/15/2022	Provide Professional Services for 311 Integration Platform Modification Project. Subcontract - 21TECH LLC (Prime) with BIAS/Deloitte to provide services (subcontract is with BIAS, which Deloitte acquired in March 2022)
<b>PO-23346</b>	CCSF Project Marlin_21 Tech PO 23346 0000551311	09/03/2021 – 09/15/2022	Professional Services: Transitional Operations Services. Subcontract - 21TECH LLC (Prime) with BIAS/Deloitte to provide services (subcontract is with BIAS, which Deloitte acquired in March 2022)
<b>1000014974</b>	CCSF Technical Accounting	07/15/2019 – 12/31/2021	Provide CAFR technical accounting resources
<b>1000024365</b>	CCSF UASI Digital Assessment	1/10/2022 – 06/30/2202	Research, plan and design/recommend an integrated, digital solution
<b>1000012304</b>	City and County of San Francisco CAFR Accounting Support Services	10/01/2018 – 09/30/2023	Provide consulting services in accounting reconciliations (previous description: Assistance in preparation CAFR)
<b>1000024730</b>	City and County of San Francisco LC-Implement & Lease Svc	06/13/2022 – 06/30/2025	Software implementation tracking Lessee & Lessor agreements assist in meeting requirements for GASB 87
<b>No Agrmt #</b>	CCSF Applicant Tracking System	08/12/2020 – 08/11/2021	Provide resources for Applicant Tracking System; subcontractor to SmartRecruiters
<b>1000021349</b>	COVID19 Inventory Controls & Accounting	06/28/2021 – 06/27/2022	Provide COVID-19 supplies inventory control and accounting services
<b>County of San Diego</b>			
<b>PO-0037738</b>	County of SD Essbase Support TM	03/28/2022 – 03/27/2023	Provide remote functional, integration, testing, end-to-end processing, and reporting management services for an Oracle Essbase Application by supplying technical resources on a Time and Materials basis; Subcontract Deloitte (Sub) and Perspecta (Prime)

Contract Number	Title	Contract Period	Project Description
<b>PO-0023293</b>	County of SD Oracle & CAFR Support TM	09/11/2020 – 03/31/2022	Provide technical resources (on demand) to provide/in support of Oracle EBS Application Technical & CAFR Support project. Subcontract BIAS Corp (sub) SOW w/ Perspecta (Prime); Deloitte acquired BIAS in March 2022
<b>County of Sacramento</b>			
<b>No Agrmt #</b>	Sac County Fed Grants	05/03/2021 – 12/31/2022	Provide expert assistance in planning, tracking, and reporting the use of Federal American Rescue Plan funds
<b>County of Los Angeles</b>			
<b>AO-19-061</b>	Hiring Innovation Services	04/21/2019 – 04/15/2021	Provide hiring innovation consulting services
<b>PS66571-2005</b>	Fareless System Initiative (FSI) Life Consulting Services	08/18/2022 – 02/17/2023	Provide professional services related to the Fareless System Initiative, including strategic roadmap, data analysis, and communication
<b>County of Los Angeles – Bench Contracts</b>			
<b>PS66571-2005</b>	Regional Rail Strategic Financial Advisory On-Call Services, Discipline 2, Advisory / Advocacy Services	12/07/2020 – 12/06/2025	Strategic advisory support services to build support among stakeholders and decision-makers relative to the project(s)
<b>PS66571-2000</b>	Regional Rail Strategic Financial Advisory On-Call Services, Discipline 1, Financial Advisory Services	12/07/2020 – 12/06/2025	Financial advisory support services: development of an attainable funding and implementation plan, feasibility analysis for potential commercial development opportunities
<b>PS61431001</b>	Public Private Partnership Advisory Services	10/28/2019 – 10/28/2024	Provide financial advisory services regarding financial analysis support to identify, assess, develop, and implement innovative projects and delivery models
<b>PS77647018</b>	IT Services Bench Contract [Deloitte Subcontractor to EK Associates}	04/18/2022 – 03/31/2027	IT services relating to LA County Metro Transit Authority Transit System to be determined by Task Order. Deloitte to perform services under subcontract with EK Associates
<b>No Agrmt #</b>	Enterprise Services Master Agreement	02/10/2021 – 02/09/2023	On-Call IT Services: Enterprise Information Technology

Contract Number	Title	Contract Period	Project Description
ITS-I10527-CA13: H35A7: H35A2: H35H4A20: H35A1: H35	Installation and Operation of Community Broadband Networks to Deliver Residential Services	11/09/2022 – 11/09/2027	Telecommunications services to be assigned through individual work orders

**Table 1-1. Deloitte's County Relationship Details.**

**DVBE Technology Group**

Contract Number	Title	Contract Period	Project Description
<b>County of Los Angeles, Metropolitan Transportation Authority</b>			
PS75040	Enterprise Asset Management System Implementation Services	09/24/2021 – 10/01/2024	Provide project managers for strategy and technical stack

**Table 1-2. DVBE Technology Group's County Relationship Details.**

**Stanfield Systems, Inc.**

Contract Number	Title	Contract Period	Project Description
<b>County of San Diego</b>			
554833	Information Technology and Telecommunications Services Agreement	11/12/2016 – 12/31/2023	Provide IT and Telecommunication hardware, software and consulting services

**Table 1-3. Stanfield Systems, Inc.'s County Relationship Details.**

**Requirement**

A description of how the Contractor will address any potential conflicts between the Work underway on current contracts and the M&E and/or Infrastructure Services;

We do not foresee an overlap in scope with other Consortium or County contracts. If the potential of a conflict or a conflict is identified by either the Contractor or the Consortium, we will work with the Consortium immediately to mutually resolve the conflict. If the Contractor or the Consortium cannot resolve the conflict, both parties will follow the Agreement – Dispute Between Contractor and Consortium process.



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**Requirement**

A statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period, which must be at least twelve (12) months from the Proposal due date specified in Section 1 or through the end of contract negotiations whichever is later;

RFP Addendum 7 was released on December 2, 2022. It included changes to Section 7.2 Term of Offer. Addendum 7 revised Section 7.2 so that it currently reads as follows:

"Proposals shall remain open, valid and subject to acceptance any time prior to the end of the Infrastructure Transition-In Period or the end of the M&E Transition-In Period (for both M&E and Consolidated Proposals)."

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This proposal will remain open, valid and subject to acceptance any time prior to the end of the Infrastructure Transition-In Period or the end of the M&E Transition-In Period (for both M&E and Consolidated Proposals).

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**Requirement**

A description of Contractor's corporate commitment to diversity, equity, and inclusion in hiring and contracting, including a description of Contractor's efforts to enter into subcontracts on the Project with qualified Minority and MWBEs and/or DVBEs; and

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**Contracting Diversity**

Diversity in our talent and our business relationships brings richness and strength to the business solutions that we provide. Our commitment to diversity extends to our supply chain, where we drive toward broadening our supplier base of minority, small, women-owned, and other diverse suppliers to provide best-in-class technology and innovative solutions to our clients. This extends to the following subcontractors included on this project:

- DVBE Technology Group (DVBE and SB-Micro)
- Stanfield Systems, Inc. (DVBE and SB)

To enable its mission of reaching \$1B in annual spend with diverse suppliers by 2025 (including \$200M in spend with Black-owned enterprises), Deloitte's Office of Business Diversity leads the charge by effectively building and leveraging relationships with diverse suppliers across the Deloitte U.S. firm. Deloitte creates business opportunities for diverse suppliers by not only inviting them to participate in appropriate contracting opportunities, but by delivering strategic programs that support suppliers' skills and capabilities development through mentor-protégé relationships and strategic market growth.

Deloitte seeks diverse suppliers of numerous types, as designated by federal, state, and local governments as well as industry organizations, including but not limited to:

- SBE: Small Business Enterprise
- DBE: Disadvantaged Business Enterprise
- SDBE: Small Disadvantaged Business Enterprise



- MBE: Minority Business Enterprise
- WBE: Women Business Enterprise
- MWBE: Minority & Woman Business Enterprise
- VOB: Veteran-Owned Business
- SDVBE: Service-Disabled Veteran Business Enterprise
- DVBE: Disabled Veteran Business Enterprise
- HUB: Historically Underutilized Business
- GLBT: Gay, Lesbian, Bisexual or Transgender

Our Office of Business Diversity's mission and vision are as follows:

Create lasting wealth for historically underrepresented businesses owned by racially and ethnically diverse people, women, persons with disabilities, LGBT community members, veterans, and others (collectively referred to as "Diverse Suppliers"). Our vision is to develop an ecosystem of internal and external stakeholders that supports the identification, recruitment, development, use, and retention of Diverse Suppliers. We also seek to influence our Tier 1 suppliers to expand Tier 2 supply chain diversity. In support of our Responsible Procurement Policy, and to influence responsibility and sustainability in our supply chain, we include standard questions in supplier RFXs to evaluate each supplier's commitment to supporting supplier diversity. For more information on Deloitte's commitment to supplier diversity, please refer to the [Deloitte Diversity, Equity, and Inclusion \(DEI\) Transparency Report](#).

### Hiring and Retention Diversity

Deloitte has been formally committed to diversity, equity, and inclusion (DEI) for over 25 years when we became the first professional services organization to establish women's and diversity initiatives. While much has changed over the years, a few things have remained constant: leadership commitment, continuous evolution, and an innovative approach. Today, we are focused on attracting, retaining, and advancing a diverse workforce and strengthening an inclusive culture where all our people can connect belong and grow.

Through collaborations and initiatives, we are expanding our talent pool by reaching talent early, preparing them for college and their careers, and building interest in our profession.

A few examples include:

- **RightStep:** Deloitte's strategy to address education needs across America, we are committing time, talent, and resources to help low-income students (predominately Black and Latinx) prepare for and persist through high school and college, then transition to a career. The RightStep Virtual Mentoring Program has grown to become the single largest year-round engagement opportunity at Deloitte. Since the

program's inception in 2017, 2,662 Deloitte mentors have served 5,946 students--and participation has skyrocketed during the pandemic.

- **Braven Accelerator:** Deloitte professionals are working with Braven to support the Braven Accelerator as leadership coaches, providing promising college students with professional development skills and mentorship. The connections made through the initiative not only help first-generation college students navigate their college experiences, but also prepare them to move into their post-graduate careers with the support of Deloitte professionals.
- **Deloitte Foundation:** STEM Pathways provides data analytics/computer science curriculum to under- resourced/underrepresented high school students. In just two years we've reached over 1,000 high school students from vulnerable communities across the country.
- **Girls Who Code Alumni Program:** Deloitte sponsors the alumni program including College Loops, university-level networks for college-aged women interested in tech designed to support one another and help each other persist and succeed in the field.

We engage in a number of activities to recruit people from a wide range of backgrounds, including offering scholarships, internships and pre-hire development opportunities. Here are a few examples:

- **Strategic sourcing relationships:** We invest annually in approximately 30 strategic sourcing relationships and alliances that assist in identifying top talent. These relationships and alliances span both our student and experienced hire recruiting efforts and include, but are not limited to: Ascend, National Association of Black Accountants, Association of Latino Professionals For America, Out & Equal, Historically Black Colleges and Universities, Management Leaders for Tomorrow, The Posse Foundation, AfroTech, Grace Hopper, and Lesbians Who Tech. We continue to explore additional programs and organizations working to create alternate pathways to employment in our communities.
- **Nontraditional recruiting:** We are also committed to augmenting the diversity of our professional talent pool by hiring and upskilling candidates from nontraditional recruitment channels. Deloitte continues to invest in hire-to-train and train-to-hire programs such as Encore, Junior Military Officer recruiting, Autism@Work, and Pathfinder.
- **HBCU Emerging Leaders in Accounting:** A multi-day program that brings together select students from HBCUs across the country for the possibility of being awarded a \$10,000 scholarship. In addition to professional development programming, participants receive mentorship by Deloitte Audit & Assurance professionals and business leaders.
- **Deloitte Women's Leadership Launch (DWLL):** During the weekend-long interactive workshop, rising female MBA/Masters candidates have the opportunity to experience formal and informal mentorship, leadership panels, classroom workshop sessions, and networking activities.

DEI is integrated throughout our development culture and embedded into major milestone trainings—from onboarding to training at each career level. We invest heavily in professional growth as demonstrated by Deloitte University. We continually provide our people with a variety of learning and networking opportunities—including exposure to leaders, sponsors, coaches, and challenging assignments—to help them as they navigate their careers. Because we all have different strengths, we know that there isn't a one size fits all when it comes to development. So, we offer a number of leadership development programs to help propel career advancement. We see deployment as a key component of development. It's through a wide variety of assignments that our people gain experience, learn from others, and are exposed to various industries and skillsets. We closely monitor deployment processes so that our people have the opportunities they need to develop and grow.

We see an inclusive culture – where our people can be their authentic selves and know they belong here – as a key factor in retention. Inclusion is embedded into our daily experiences and allows our people to connect, belong, and grow. We bring it to life through:

- Inclusion councils across the country
- A focus on inclusive leadership behaviors
- Inclusion Summit
- Day of Understanding
- Empowered Well-being
- Paid Family Leave
- Mental Health @ Work

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**Requirement**

The 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.;

---

As a Principal, Rachel Frey is authorized to bind the bidding firm contractually and has electronically signed this Transmittal Letter. Rachel is authorized to negotiate on behalf of Deloitte Consulting LLP and commit the organization to the terms and conditions of the Agreement resulting from this procurement.

# Table of Contents

**RFP Reference: 6.3.7.2 Table of Contents**  
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.

## 1.0 Executive Summary

With Deloitte you get: Market leading experience, innovation, and people from our current footprint of 26 E&E systems, and successful delivery of 31 E&E systems over the past 40 years. .... 1-3

We'll provide the delivery integration the Consortium desires across CalSAWS' stakeholder environment. .... 1-4

We start designing the CalSAWS modernization effort during Transition In and complete the Oracle database migration before the end of the 1st Year of the base contract..... 1-5

We bring broad capabilities and alliances to support the Consortium in any direction it needs to go..... 1-6

A diverse, experienced team that knows how to deliver both E&E innovation and CalSAWS operational continuity ..... 1-7

A proven, low-risk approach to transition, as California has seen firsthand helps the Consortium challenge the status quo, innovate, and improve its operations and those of the Counties ..... 1-8

Proactive, long-term planning and risk mitigation to continually exceed California Counties' expectations..... 1-9

Deloitte is the best vendor to help the Consortium color outside the lines to achieve its goals ..... 1-10

## 2A M&E Firm Qualifications

2A.1 Firm Experience Details..... 2-2

2A.1.1 Relevant Firm Experience Details .....2-2

2A.1.1.1 Our Government & Public Services Practice .....2-4

2A.1.1.2 Our Commitment to California .....2-8

2A.1.1.3 Firm Organization Chart.....2-9

2A.1.2 Narrative Description of M&E Related Capabilities .....2-11

2A.1.2.1 Application Maintenance and System Modifications (ME-F1) .....2-13

2A.1.2.2 Operational Activities (ME-F2) .....2-14

2A.1.2.3 Large Complex IT Systems (ME-F3).....	2-15
2A.1.2.4 System Transition (ME-F4) .....	2-18
2A.1.3 Mandatory M&E Firm Qualifications.....	2-19
2A.1.3.1 Experience Performing Application Maintenance and System Modifications (ME-F1) .....	2-20
2A.1.3.2 Experience Performing Operational Activities (ME-F2) .....	2-21
2A.1.3.3 Experience with Large and Complex IT System Projects (ME-F3) .....	2-23
2A.1.3.4 Experience Transitioning a Large and Complex IT System (ME-F4) ...	2-26
2A.1.4 M&E Firm References.....	2-27

## **3.0 Staffing Approach**

### **3.1 Staffing Approach Narrative ..... 3-2**

3.1.1 M&E Staffing Approach (ME-S1) .....	3-2
3.1.1.1 General Contractor Staffing Responsibilities .....	3-3
3.1.1.2 Staff Responsibilities .....	3-14
3.1.1.3 Contractor Staff Changes.....	3-20
3.1.1.4 Staff Performance.....	3-22
3.1.1.5 Staffing Worksheets (ME-S2) .....	3-25
3.1.2 M&E Key Staff.....	3-25
3.1.2.1 M&E Project Manager .....	3-26
3.1.2.2 M&E PMO Lead.....	3-28
3.1.2.3 M&E Delivery Integration Manager.....	3-30
3.1.2.4 M&E Transition Manager.....	3-32
3.1.2.5 M&E Innovation Lead .....	3-34
3.1.2.6 M&E Enterprise Architect .....	3-36
3.1.2.7 M&E Technical Manager.....	3-38
3.1.2.8 M&E Application Manager .....	3-40
3.1.2.9 M&E Security Manager.....	3-42
3.1.2.10 M&E Testing Manager.....	3-44
3.1.2.11 M&E Release Manager.....	3-46
3.1.2.12 M&E Project Scheduler .....	3-47
3.1.3 Additional Project Leadership and Advisors .....	3-49

### **3.2 Staffing Experience Details..... 3-51**

3.2.1 Staff Resumes and Qualifications.....	3-51
3.2.2 M&E Key Staff Client References.....	3-51

## 4.0 Understanding and Approach to M&E Services

<b>Supporting the Most Vulnerable Among Us .....</b>	<b>4-2</b>
<b>Delivering With You .....</b>	<b>4-3</b>
<b>Key Features of Our Approach .....</b>	<b>4-5</b>
<b>4.1 Integrated Multi-Contractor Environment .....</b>	<b>4-6</b>
4.1.1 Managing and Coordinating Scope of Work (ME-UA1).....	4-9
4.1.1.1 Scope Management .....	4-9
4.1.2 Collaborating with Infrastructure Contractor (ME-UA2) .....	4-12
4.1.2.1 Planning Shared Services .....	4-14
4.1.2.2 Design .....	4-16
4.1.2.3 Development and Test Shared Services .....	4-17
4.1.2.4 Deployment.....	4-19
4.1.2.5 Operations.....	4-20
4.1.2.6 Coordination with Interface Partners .....	4-22
4.1.3 Risks and Mitigation Strategies (I-UA3) .....	4-23
<b>4.2 Application/Architecture Evolution .....</b>	<b>4-25</b>
4.2.1 Breaking Down the CalSAWS Application (ME-UA4) .....	4-27
4.2.1.1 Strategy and Approach .....	4-27
4.2.1.2 Addressing Security Considerations, Reducing Costs and Improving Optimization and Flexibility.....	4-44
4.2.2 Maintaining Legacy Architecture (ME-UA5).....	4-46
4.2.2.1 Keeping Platforms Synchronized .....	4-46
4.2.2.2 Integrating with Existing Technologies and Networks .....	4-48
4.2.2.3 Testing Changes.....	4-49
4.2.2.4 Other Factors Including Security Controls.....	4-50
4.2.3 Advancing the DevOps Model (ME-UA6).....	4-50
4.2.3.1 Approach to Advance the DevOps Model .....	4-50
4.2.3.2 Approach to Using Infrastructure as Code .....	4-53
4.2.4 Challenges and Risks to Evolving CalSAWS (ME-UA7) .....	4-56
4.2.5 Challenges and Risks to Establishing Our DevOps Approach (ME-UA8).....	4-57
<b>4.3 System Change Requests .....</b>	<b>4-58</b>
4.3.1 SDLC Methodology for CalSAWS Changes (ME-UA9) .....	4-60
4.3.1.1 EVD Hybrid Agile Benefits and Phases .....	4-61
4.3.2 Improving Existing CalSAWS SCR Processes (ME-UA10) .....	4-67



4.3.2.1 Deliver Changes More Quickly to End Users .....	4-67
4.3.2.2 Alignment to M&E Staffing Worksheet .....	4-69
4.3.3 Improving the Existing CalSAWS Approach to UCD (ME-UA11) .....	4-70
4.3.4 CI/CD Security Measures (ME-UA12) .....	4-72
4.3.4.1 Approach for Proactive Security Controls .....	4-72
4.3.5 Risks and Mitigation Strategies (ME-UA13) .....	4-76
<b>4.4 Innovation .....</b>	<b>4-77</b>
4.4.1 Why Choose Deloitte to Deliver Innovation? .....	4-81
4.4.1.1 Our Demonstrated E&E Innovation Record .....	4-81
4.4.1.2 Cutting Edge Centers of Insight Across Industries .....	4-81
4.4.1.3 Our Expansive E&E Support and HHS Network .....	4-82
4.4.1.4 Analyst Acclaimed, Dedicated Innovation Practice .....	4-83
4.4.1.5 Our Proven Innovation Framework .....	4-83
4.4.2 Approach to Evaluating Innovations and Formulating Recommendations (ME-UA14) .....	4-85
4.4.2.1 Explore and Identify Innovations .....	4-86
4.4.2.2 Evaluate, Analyze, and Recommend Technologies .....	4-88
4.4.2.3 Coordinating with the Consortium to Evaluate Technologies .....	4-89
4.4.2.4 Integration of Selected Innovations and Technologies into CalSAWS .....	4-89
4.4.2.5 Evaluating Value and Impact to Business Operations .....	4-93
4.4.3 Examples of Successful Innovation Programs (ME-UA15) .....	4-95
4.4.3.1 Colorado Department of Human & Health Services Program Eligibility Application Kit (PEAK) and Colorado Benefits Management (CMBS) .....	4-95
4.4.3.2 [REDACTED] .....	4-96
4.4.3.3 [REDACTED] .....	4-97
4.4.3.4 [REDACTED] .....	4-98
4.4.4 Participating and Supporting the Existing CalSAWS Innovation Team (ME- UA16) .....	4-99
4.4.4.1 Extending the Reach of the CalSAWS Innovation Team .....	4-99
<b>4.5 Transition-In .....</b>	<b>4-101</b>
4.5.1 Experience with Transitions (ME-UA17) .....	4-103
4.5.1.1 [REDACTED] .....	4-104
4.5.1.2 California Healthcare Eligibility, Enrollment & Retention System (CalHEERS) .....	4-107
4.5.2 Transition Manager's Experience (ME-UA18) .....	4-110

4.5.2.1 California Healthcare Eligibility, Enrollment & Retention System (CalHEERS) .....	4-110
4.5.2.2 [REDACTED] .....	4-112
4.5.3 Risks and Mitigation Strategies (ME-UA19) .....	4-113

## **5.0 Approach to Imaging Services**

<b>5.1 Our Imaging Experience .....</b>	<b>5-3</b>
<b>5.2 Imaging Approach .....</b>	<b>5-5</b>
5.2.1 Stabilization Phase (3 Months) .....	5-5
5.2.1.1 Transition-In .....	5-5
5.2.1.2 Discovery Activities .....	5-6
5.2.1.3 Foundational Closeout .....	5-7
5.2.2 Optimization Phase (6 Months) .....	5-7
5.2.2.1 System Performance .....	5-7
5.2.2.2 Data Enhancement .....	5-7
5.2.2.3 Financial Assessment .....	5-8
5.2.3 Modernization Phase (Ongoing 3 Month Sprints) .....	5-8
5.2.3.1 New Software Providers .....	5-8
5.2.3.2 Next-Level Features & Services .....	5-9
<b>5.3 Staffing and Resource Allocation .....</b>	<b>5-9</b>
<b>5.4 Strategic Benefits Summary .....</b>	<b>5-10</b>

## **6.0 Required Attachments**

<b>Attachment G4 – DAFUR Contracting Act Certification .....</b>	<b>G4-1</b>
<b>Attachment G5 – Certificate of Firm Status .....</b>	<b>G5-1</b>
<b>Attachment B4 – M&amp;E Statement of Compliance With Requirements .....</b>	<b>B4-1</b>
<b>Attachment B7 – M&amp;E Exceptions to The Agreement .....</b>	<b>B7-1</b>
<b>Attachment B8 – M&amp;E Firm Mandatory Qualifications .....</b>	<b>B8-1</b>
<b>Minimum Experience ME-F1 .....</b>	<b>B8-2</b>
Project #1: State of Texas Health and Human Services Commission (HHSC): Texas Integrated Eligibility Redesign System (TIERS) .....	B8-2

Project #2: State of Colorado, Governor's Office of Information Technology: Colorado Benefits Management System (CBMS) .....	B8-5
<b>Minimum Experience ME-F2.....</b>	<b>B8-8</b>
Project #1: State of Texas Health and Human Services Commission (HHSC): Texas Integrated Eligibility Redesign System (TIERS) .....	B8-16
Project #2: Michigan Department of Technology, Management, and Budget (DTMB): Bridges M&O Project .....	B8-13
<b>Minimum Experience ME-F3.....</b>	<b>B8-16</b>
Project #1: Tennessee TennCare: Tennessee Eligibility Determination System (TEDS) .....	B8-16
Project #2: Commonwealth of Pennsylvania: Client Information System (CIS) .....	B8-19
<b>Minimum Experience ME-F4.....</b>	<b>B8-21</b>
Project #1: State of California, Office of Systems Integration (OSI): California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) .....	B8-21
Project #2: Arkansas: Arkansas DHS Information Support Services (ISS) .....	B8-22
<b>Attachment B9 – M&amp;E Firm Reference Form .....</b>	<b>B9-1</b>
Reference #1 – TennCare: Cloud Managed Services Contract .....	B9-2
Reference #2 – State of California, Office of Systems Integration – CalHEERS ...	B9-6
<b>Attachment B10 – Maintenance and Enhancements Key Staff Resumes/Staff Qualifications .....</b>	<b>B10-1</b>
1.1 M&E Project Manager, Rakesh Duttgupta .....	B10-2
1.2 M&E Project Management Office Lead, Donna Cain .....	B10-16
1.3 M&E Delivery Integration Manager, Kishan Mallur .....	B10-26
1.4 M&E Transition Manager, Michael Henry .....	B10-43
1.5 M&E Innovation Lead, Roberto Cota .....	B10-52
1.6 M&E Enterprise Architect, Lori Olson .....	B10-62
1.7 M&E Technical Manager, Jerald “Jerry” Nielson .....	B10-80
1.8 M&E Application Manager, Surranjan Kumar .....	B10-97
1.9 M&E Security Manager, Debi Mohanty .....	B10-107
1.10 M&E Test Manager, Mufaddal Tinmaker .....	B10-127
1.11 M&E Release Manager, Kimberle Buchter .....	B10-141
1.12 M&E Project Scheduler, Robert Daffin .....	B10-149
<b>Attachment B11 – M&amp;E Key Staff Reference Form .....</b>	<b>B11-1</b>
<b>M&amp;E Project Manager, Rakesh Duttgupta .....</b>	<b>B11-3</b>
Reference 1 – [REDACTED] .....	B11-3

Reference 2 – [REDACTED] .....	B11-5
<b>M&amp;E Project Management Office (PMO) Lead, Donna Cain .....</b>	<b>B11-7</b>
Reference 1 – [REDACTED] .....	B11-7
Reference 2 – [REDACTED] .....	B11-10
<b>M&amp;E Delivery Integration Manager, Kishan Mallur .....</b>	<b>B11-13</b>
Reference 1 – [REDACTED] .....	B11-13
Reference 2 – [REDACTED] .....	B11-15
<b>M&amp;E Transition Manager, Michael Henry .....</b>	<b>B11-17</b>
Reference 1 – [REDACTED] .....	B11-17
Reference 2 – [REDACTED] .....	B11-19
<b>M&amp;E Innovation Lead, Roberto Cota .....</b>	<b>B11-21</b>
Reference 1 – [REDACTED] .....	B11-21
Reference 2 – [REDACTED] .....	B11-23
<b>M&amp;E Enterprise Architect, Lori Olson .....</b>	<b>B11-25</b>
Reference 1 – [REDACTED] .....	B11-25
Reference 2 – [REDACTED] .....	B11-27
<b>M&amp;E Technical Manager, Jerald “Jerry” Nelson .....</b>	<b>B11-29</b>
Reference 1 – [REDACTED] .....	B11-29
Reference 2 – [REDACTED] .....	B11-31
<b>M&amp;E Application Manager, Surranjan Kumar .....</b>	<b>B11-33</b>
Reference 1 – [REDACTED] .....	B11-33
Reference 2 – [REDACTED] .....	B11-35
<b>M&amp;E Security Manager, Debi Mohanty .....</b>	<b>B11-37</b>
Reference 1 – [REDACTED] .....	B11-37
Reference 2 – [REDACTED] .....	B11-39
<b>M&amp;E Testing Manager, Mufaddal Tinmaker .....</b>	<b>B11-41</b>
Reference 1 – [REDACTED] .....	B11-41
Reference 2 – [REDACTED] .....	B11-43
<b>M&amp;E Release Manager, Kimberle Buchter .....</b>	<b>B11-45</b>
Reference 1 – [REDACTED] .....	B11-45
Reference 2 – [REDACTED] .....	B11-47
<b>M&amp;E Project Scheduler, Robert Daffin .....</b>	<b>B11-49</b>
Reference 1 – [REDACTED] .....	B11-49
Reference 2 – [REDACTED] .....	B11-51

# List of Figures

## 1.0 Executive Summary

Figure 1-1. We Bring the Mindset Shift the Consortium Needs to Meet Its Goals .....	1-2
Figure 1-2. CalSAWS is Modernized Faster by Deloitte's Market-Leading Experience	1-3
Figure 1-3. Deloitte Understands the CalSAWS Stakeholder Ecosystem .....	1-4
Figure 1-4. Our Holistic Approach to Delivering Key First-Year Initiatives .....	1-5
Figure 1-5. All the Capabilities CalSAWS Needs to Keep Pace with the World .....	1-6
Figure 1-6. A Diverse, Experienced Team to Help the Consortium Succeed .....	1-7
Figure 1-7. A Realistic, Compliant, and Experienced Approach to Transition .....	1-8

## 2A M&E Firm Qualifications

Figure 2A-1. Deloitte Worldwide and in the United States. ....	2-3
Figure 2A-2. Deloitte Government & Public Consulting Services. ....	2-4
Figure 2A-3. Deloitte U.S. GPS Client Impact.....	2-5
Figure 2A-4. Deloitte Health and Human Services Experience.....	2-6
Figure 2A-5. Deloitte Cloud Product and Vendor Relationships. ....	2-7
Figure 2A-6. Deloitte in California.....	2-8
Figure 2A-7. Firm Organization Chart.....	2-10
Figure 2A-8. Deloitte's Proven Experience to Meet CalSAWS Needs. ....	2-11
Figure 2A-9. Deloitte's Principles for Multi-Stakeholder Engagement. ....	2-17
Figure 2A-10. Deloitte's Relevant Transition Experience.....	2-18
Figure 2A-11. Deloitte Exceeds CalSAWS M&E Experience Requirements. ....	2-19

## 3.0 Staffing Approach

Figure 3-1. Deloitte GPS Capabilities Enable to Provide for the CalSAWS Project.....	3-3
Figure 3-2. CalSAWS M&E Services Tasks and Subtasks. ....	3-4
Figure 3-3. Deloitte's M&E Organizational Chart. ....	3-9
Figure 3-4. Deloitte's Business Chemistry Four Types. ....	3-13
Figure 3-5. Issue Management Process. ....	3-17
Figure 3-6. Deloitte's Reputation as an Employer of Choices Helps us Minimize Turnover. ....	3-18

Figure 3-7. Proactively Managing Staff Changes. ....	3-21
Figure 3-8. The M&E Leadership Team. ....	3-25
Figure 3-9. M&E Project Manager. ....	3-27
Figure 3-10. M&E PMO Lead. ....	3-29
Figure 3-11. M&E Delivery Integration Manager. ....	3-31
Figure 3-12. M&E Transition Manager. ....	3-33
Figure 3-13. M&E Innovation Lead. ....	3-35
Figure 3-14. M&E Enterprise Architect. ....	3-37
Figure 3-15. M&E Technical Manager. ....	3-39
Figure 3-16. M&E Application Manager. ....	3-41
Figure 3-17. M&E Security Manager. ....	3-43
Figure 3-18. M&E Testing Manager. ....	3-45
Figure 3-19. M&E Release Manager. ....	3-46
Figure 3-20. M&E Project Scheduler. ....	3-48
Figure 3-21. Project Leadership and Advisors. ....	3-49
Figure 3-22. Project Leadership and Advisors. ....	3-50
Figure 3-23. Project Leadership and Advisors. ....	3-50
Figure 3-24. Project Leadership and Advisors. ....	3-50

## **4.0 Understanding and Approach to M&E Services**

Figure 4-1. CalSAWS' Current State. ....	4-2
Figure 4.1-1. Approach to Scope Management. ....	4-9
Figure 4.1-2. Sample Tasks Requiring OLAs. ....	4-11
Figure 4.1-3. Cross-Team Collaboration to Deliver Shared Services. ....	4-13
Figure 4.1-4. Shared Planning Activities. ....	4-14
Figure 4.1-5. Shared Design Activities. ....	4-16
Figure 4.1-6. Shared Development and Testing Activities. ....	4-17
Figure 4.1-7. Shared Deployment Activities. ....	4-19
Figure 4.1-8. Shared Operations Activities. ....	4-20
Figure 4.1-9. How We Collaborate with Interface Partners. ....	4-22
Figure 4.2-1. Deloitte Delivers a CalSAWSCN that Meets the Consortium's Objective. ....	4-26
Figure 4.2-2. An Industry-Leading Partnership in Your Focus Areas. ....	4-27
Figure 4.2-3. Guiding Principles for CalSAWSCN Architecture Evolution Roadmap. ....	4-28



Figure 4.2-4. Design Guidelines for CalSAWSCN Architecture Evolution Roadmap. .	4-28
Figure 4.2-5. The Reference Architecture That Guides CalSAWSCN.....	4-30
Figure 4.2-6. An Automated Microservices Blueprint Accelerating Modularization. .	4-32
Figure 4.2-7. Journey Towards Serverless Cloud Native Adoption.....	4-33
Figure 4.2-8. Deloitte's DMF Toolset.....	4-35
Figure 4.2-9. Incremental Migration Plan.....	4-36
Figure 4.2-10. Migration Approach Built on Deloitte's DMF Framework.....	4-36
Figure 4.2-11. Possible Serverless Destinations for CalSAWS Modules.....	4-39
Figure 4.2-12. Recommended Phases and Sequence for Modularizing CalSAWS....	4-40
Figure 4.2-13. Proposed Plan for Task Management Redesign. ....	4-43
Figure 4.2-14. AI/ML Operations Continuum. ....	4-44
Figure 4.2-15. AI Engines That Can Be Considered.....	4-44
Figure 4.2-16. Driving FinOps Discipline Nationwide. ....	4-45
Figure 4.2-17. Four Pillars for Evolving and Maintaining Legacy Architecture.....	4-46
Figure 4.2-18. How We Enable Co-Existence During Evolution with the Strangler ....	4-47
Figure 4.2-19. Example: AR Prior To Strangler Fig.....	4-47
Figure 4.2-20. Example: Co-Existing AR Microservices and Legacy Applications. ....	4-47
Figure 4.2-21. Example: Parallel Change Management between Legacy Code and CalSAWSCN.....	4-48
Figure 4.2-22. Validating and Testing the Data and Modules. ....	4-49
Figure 4.2-23. The CALMS Model for Adopting and Utilizing a DevOps Approach. ..	4-51
Figure 4.2-24. Evolving DevOps to Deliver Improved Security and Stability Outcomes. .....	4-52
Figure 4.2-25. Code and IaC Pipelines. ....	4-55
Figure 4.3-1. CalSAWS Stakeholder Ecosystem. ....	4-60
Figure 4.3-2. The Spectrum of Agility.....	4-61
Figure 4.3-3. Current CalSAWS Traditional SDLC Flow.....	4-62
Figure 4.3-4. Time and Cost Benefits from Hybrid Agile. ....	4-62
Figure 4.3-5. Continuous Delivery Flow. ....	4-67
Figure 4.3-6. Additions for Resource Capacity. ....	4-69
Figure 4.3-7. Continuous Avenues of Feedback.....	4-71
Figure 4.3-8. Overview of Deloitte Approach for DevSecOps.....	4-73
Figure 4.3-9. Security Activities Integrated within CI/CD Pipeline.....	4-74
Figure 4.4-1. Deloitte is the leader in delivering innovation to organizations like CalSAWS. ....	4-77
Figure 4.4-2. Deloitte's 2022 Tech Trends Report.....	4-81

Figure 4.4-3. Example HHS RFI.....	4-82
Figure 4.4-4. Total Innovation Framework.....	4-84
Figure 4.4-5. Innovation Guiding Principles. ....	4-85
Figure 4.4-6. Our Innovation Process Starts Broad and Narrows Based on Value.....	4-86
Figure 4.4-7. Deloitte's AI Engines Deployed Across the Nation.....	4-90
Figure 4.4-8. Colorado HHS PEAK and CBMS. ....	4-95
Figure 4.4-9. [REDACTED].....	4-96
Figure 4.4-10. [REDACTED].....	4-97
Figure 4.4-11. Innovation Task Force. ....	4-98
Figure 4.4-12. CalSAWS Innovation Team Roles and Responsibilities. ....	4-99
Figure 4.4-13. BenefitsCal Collaboration. ....	4-100
Figure 4.5-1. A Proven and Repeatable Transition-In Approach.....	4-102
Figure 4.5-2. We Bring a Diverse Record of Transitioning Complex Systems Across Industries. ....	4-103
Figure 4.5-3. [REDACTED].....	4-105
Figure 4.5-4. CalHEERS Transition Timeline.....	4-107

## **5.0 Approach to Imaging Services**

Figure 5-1. Deloitte Differentiators.....	5-3
Figure 5-2. Deloitte's Imaging Services Framework. ....	5-5

# List of Tables

## 1.0 Executive Summary

Table 1-1. Risks and How Deloitte Mitigates Them.....	1-9
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## 2A M&E Firm Qualifications

Table 2A-1. Deloitte M&E Experience.....	2-12
Table 2A-2. Example of Deloitte's Large Complex IT System Experience.....	2-16
Table 2A-3. Select Deloitte M&E Experiences.....	2-20

## 3.0 Staffing Approach

Table 3-1. Compliance Matrix for Section 6.3.8.5.1 Requirements.....	3-2
Table 3-2. Engagement Guiding Principles.....	3-6
Table 3-3. Selection Criteria for Deloitte Staff.....	3-12
Table 3-4. Key Steps of Issue Management Process.....	3-17
Table 3-5. Examples of Methods Deloitte Uses to Minimize Turnover.....	3-20
Table 3-6. Performance Review Activities Carried Out by the Deloitte Leadership Team.....	3-24

## 4.0 Understanding and Approach to M&E Services

Table 4-1. Key Reasons Deloitte Is the Right Vendor for M&E.....	4-5
Table 4.1-1. Considerations for Our Integrated Multi-Contractor Environment Approach.....	4-8
Table 4.1-2. Risks and Mitigation Plans.....	4-24
Table 4.2-1. Application/Architecture Evolution at CalHEERS.....	4-29
Table 4.2-2. Application Evolution Roadmap from Architecture Through Operations.....	4-31
Table 4.2-3. Value Derived from the Application / Architecture Evolution Phases.....	4-34
Table 4.2-4. Technology Stack Modernization Targets.....	4-37
Table 4.2-5. Serverless Evaluation Criteria for Modularization.....	4-38
Table 4.2-6. Opportunities to Evaluate and Modernize Task Management.....	4-42
Table 4.2-7. Shared Services Integration Options.....	4-49

Table 4.2-8. DevOps Activity Areas Delivering Superior Operations Outcomes. ....4-53

Table 4.2-9. IaC Focus Areas Increasing Robustness and Reliability. ....4-54

Table 4.2-10. Addressing Challenges with Evolving the Database and  
Application.....4-57

Table 4.2-11. Addressing DevOps Challenges While Evolving CalSAWS. ....4-57

Table 4.3-1. Considerations for Our SCR Approach. ....4-59

Table 4.3-2. Activities for Planning.....4-63

Table 4.3-3. Activities for Analyzing, Designing and Building Changes. ....4-64

Table 4.3-4. Activities for Testing.....4-65

Table 4.3-5. Activities for Deployment. ....4-66

Table 4.3-6. Aspects of Continuous Delivery. ....4-68

Table 4.3-7. Testing Improvements.....4-69

Table 4.3-8. Implementing Improvements to Benefit UCD and User Experience.....4-71

Table 4.3-9. Key Security Controls We Integrate Into our CI/CD Processes. ....4-75

Table 4.3-10. Challenges and Proposed Mitigation Strategies.....4-76

Table 4.4-1. Considerations for Our Innovation Approach. ....4-80

Table 4.4-2. Innovation Assessment Steps. ....4-91

Table 4.5-1. The Consortium's Focus Area is Front and Center to Our Approach. ..4-101

Table 4.5-2. Risks and Mitigation Strategies.....4-114

5.0 Approach to Imaging Services

Table 5-1. Considerations for Our Approach to Imaging Services.....5-3

Table 5-2. Key Features of Our Approach.....5-10

# Executive Summary

## Section 1

RFP Reference: 6.3.8.3 Section 1 – Executive Summary

California will soon be served by a single, statewide eligibility system: CalSAWS. It will be a significant achievement for the CalSAWS Consortium, its vendors, and each stakeholder involved. We know. We've been by your side for the past two years on the journey to "**the Power of 58.**" The Counties and County-designated support organizations will soon be able to use CalSAWS to support Californians across the entire State.

*The possibilities of where the Consortium can go from here are endless.*

The Consortium needs a trusted vendor at its side to work with California's 58 counties, numerous State Partner organizations (e.g., CDSS, OSI, DHCS, ODI, EDD), CWDA and an active advocate community after the migration is complete. A vendor that can think strategically and collaboratively through problems, propose holistic solutions to those problems, deliver using responsive agile processes, and has the diverse technology capabilities to support whatever direction the Consortium and the Counties not just want but need to go.

Additionally, even though CalSAWS will seem new to many of its users, from a technology perspective the base CalSAWS solution (the LA Leader Replacement System (LRS)) is over 15 years old. It has significant technical debt that

will need to be addressed in the next five years if California wants to catch up to the rest of the country in how it uses technology to support CalFresh, Medi-Cal, CalWORKs and other Health and Human Services (HHS) programs.

**With Deloitte, the Consortium gets access to the deepest set of relevant experience needed to #EvolveCalSAWS to meet a rapidly changing technology and program landscape.**

Our record of implementing 31 (and currently maintaining 26) Eligibility and Enrollment (E&E) systems like CalSAWS, including those using AWS, enables us to help the Consortium think outside the box, shift the operational mindset (as highlighted in Figure 1-1 on the next page) not only to advance CalSAWS technologically, but also to help the Consortium mature its planning, governance, and software development processes.

**The result: An evolved and optimized CalSAWS and a high-performing Consortium organization that are assets to Counties and the State as they support Californians in need statewide. #thePowerOf58.**

Let us help you  
*color*  
outside the lines



CA\_CON\_CalSAWS M&O MIO-379038 2022-0202 05

Figure 1-1. We Bring the Mindset Shift the Consortium Needs to Meet Its Goals.



## With Deloitte you get...

**Market leading experience, innovation, and people from our current footprint of 26 E&E systems, and successful delivery of 31 E&E systems over the past 40 years.**

**Why it matters:** The Consortium innovates to meet Counties' needs faster using the ideas, approaches, and innovation that Deloitte brings from across the nation.

California has been on a journey to integrate its 58 Counties. With this almost complete, it can start to turn its focus to the innovation and program needs that have been deferred during the migration. By working with Deloitte, **the Consortium doesn't need to do this alone**. Our key staff alone bring experience delivering E&E systems like CalSAWS from a dozen states. Additionally, we have an HHS and Labor Nerve Center with dedicated staff. Our Nerve Center supports our teams in the field with information, federal policy clarifications, approaches, and innovation from across our HHS practice, including 26 E&E systems we currently maintain and enhance.

Our national E&E experience, as illustrated in Figure 1-2, is even more critical given the Consortium's goal of migrating CalSAWS from its current monolithic architecture to a modular, easy to maintain, technically advanced application. Deloitte has done this in multiple states, including most recently in Oregon, Arkansas, and Indiana. Our team brings thought leadership on modularity, including an **E&E-specific blueprint for moving to a microservice-based architecture** for E&E systems like CalSAWS.

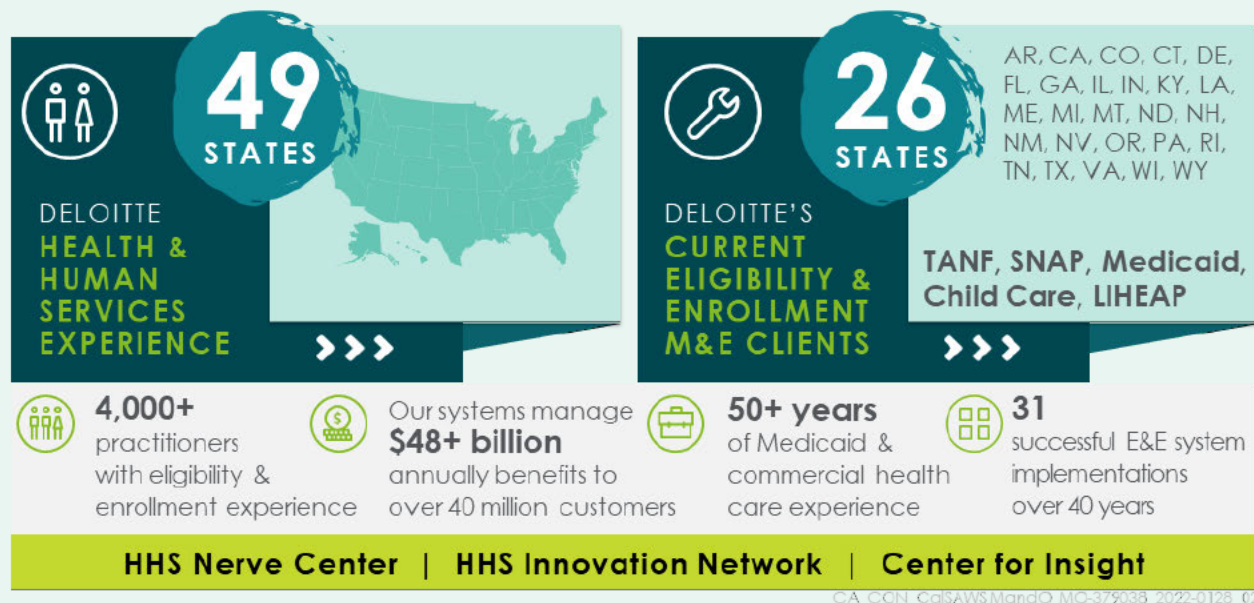


Figure 1-2. CalSAWS is Modernized Faster by Deloitte's Market-Leading Experience.

## We'll provide the delivery integration the Consortium desires across CalSAWS' stakeholder environment.

**Why it matters:** The Consortium gets better collaboration between its vendors, which translates into quicker delivery of the changes Counties want, better CalSAWS stability, and, ultimately, a CalSAWS application that enables improved program outcomes.

We often tell practitioners we bring into the BenefitsCal project or other projects we deliver in California that, **"California is more complex than any other state you have experience, including those that are county-administered."** By this we mean it has a unique, large, and extremely active stakeholder community, as highlighted in Figure 1-3. We have worked closely with the Consortium leadership, both with the BenefitsCal project, and the CalWIN migration, to navigate and manage this stakeholder environment. We understand what it takes to be successful at CalSAWS because we have already delivered within it. But, equally of critical importance, our team also has significant experience outside the CalSAWS environment. Our team members have not spent their entire career in a single environment like the current incumbent. Our team is not fixed on how things have always been done. In short, our team **can better help the Consortium color outside the lines.**

A key goal in the next contract, as demonstrated by the planned Delivery Integration Office (DIO), is for CalSAWS to *"implement new governance processes that promote the full integration of the Contractor and Consortium teams."* To be successful in this effort, CalSAWS needs more than a new office. **It needs contemporary ideas. It needs a fresh approach.** Deloitte, through its E&E network and informed by our BenefitsCal experience, can bring the **thoughtful and holistic approach** needed to make the new DIO a success, ultimately delivering integration that lets CalSAWS get more done to meet its diverse stakeholders needs.

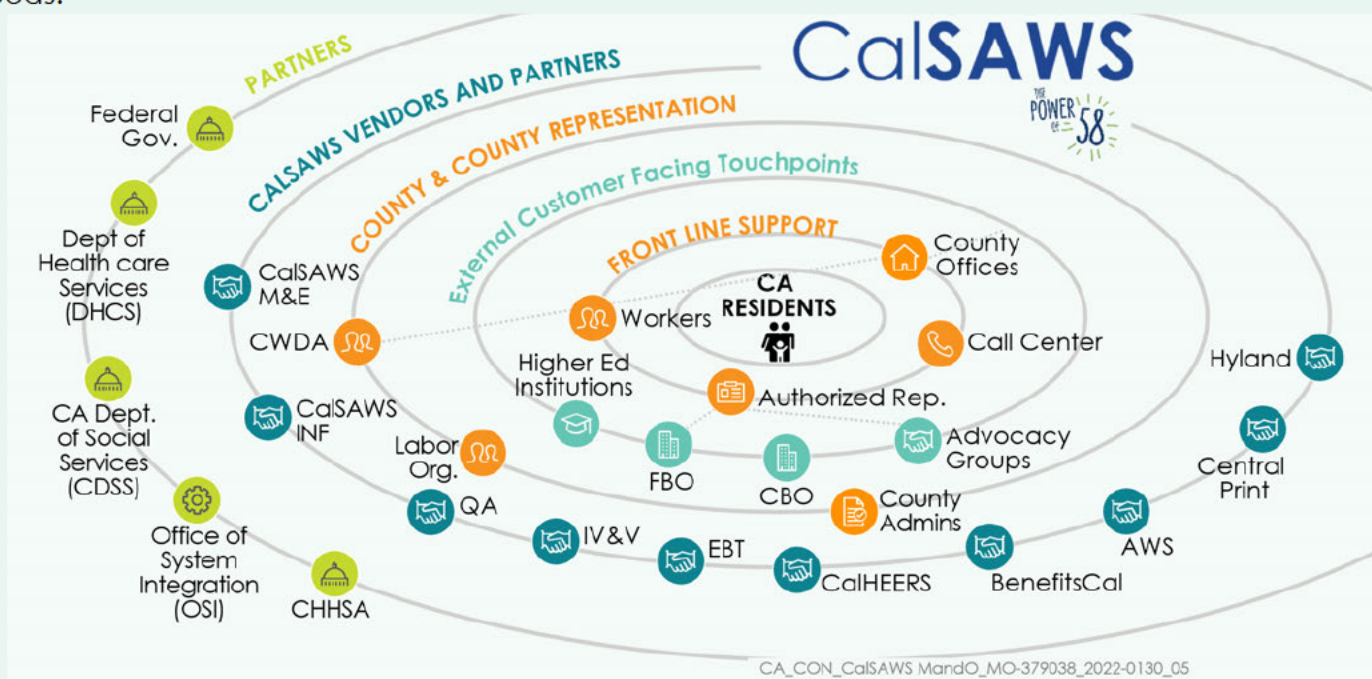


Figure 1-3. Deloitte Understands the CalSAWS Stakeholder Ecosystem.

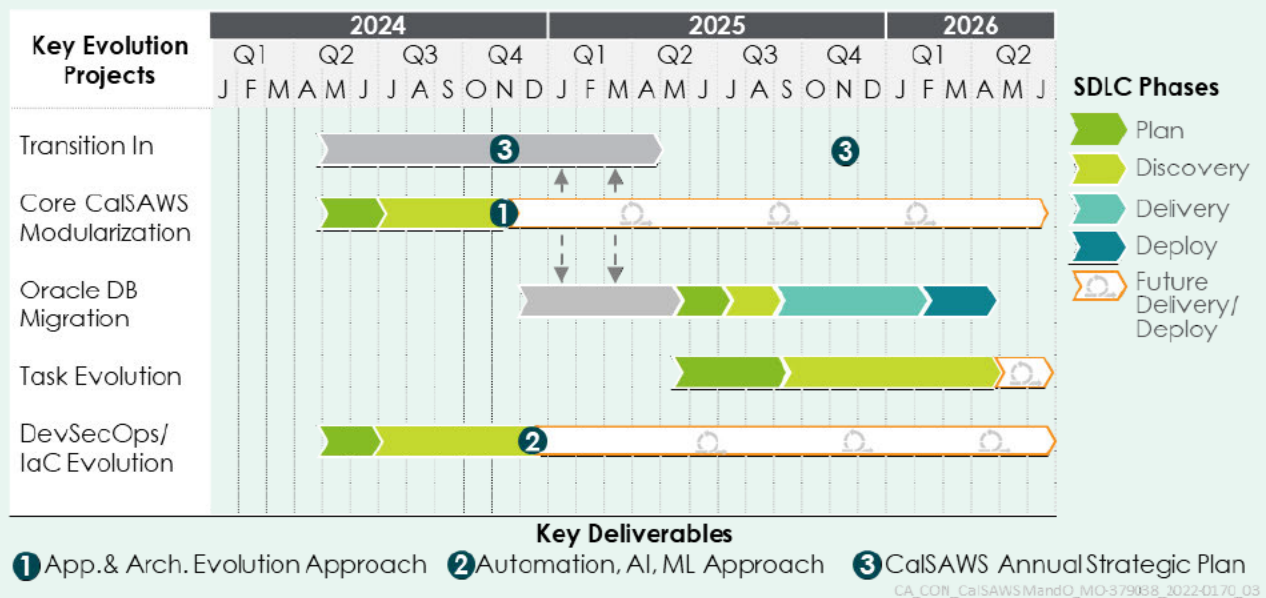
## We start designing the CalSAWS modernization effort during Transition In and complete the Oracle database migration before the end of the 1<sup>st</sup> Year of the base contract.

**Why it matters:** The Consortium demonstrates its ability to deliver for Counties by delivering key efforts within 24 months of the start of the M&E contract, freeing up budget for additional County and program enhancements

Now that California is united in one statewide system, it is time pivot to addressing the Counties needs that have been pending during the migration. Using our recent Oracle migration experience from CalHEERS and other state agencies, along with our experience delivering human-centered task management solutions in E&E in 10 states in the past 5 years alone, we have developed a **realistic approach to completing the first steps of the CalSAWS application evolution**. Our approach to these projects, summarized in Figure 1-4, considers California's unique County-administered environment. It also accounts for the realities of working in one system where **standardization and the Counties' unique needs must be balanced** to deliver a maintainable solution for the Consortium.

DISTINGUISHING FACTORS

- We implement a modern task management microservice that begins the modularization of CalSAWS.
- We bring a realistic and holistic approach to County participation in the task management initiative.
- Our approach is based on CalHEERS' successful Oracle migration to Aurora PostgreSQL.
- Key database migration and task management initiatives are delivered per Consortium-specified dates, or earlier if the Consortium prefers.



**Figure 1-4. Our Holistic Approach to Delivering Key First-Year Initiatives.**



## We bring broad capabilities and alliances to support the Consortium in any direction it needs to go.

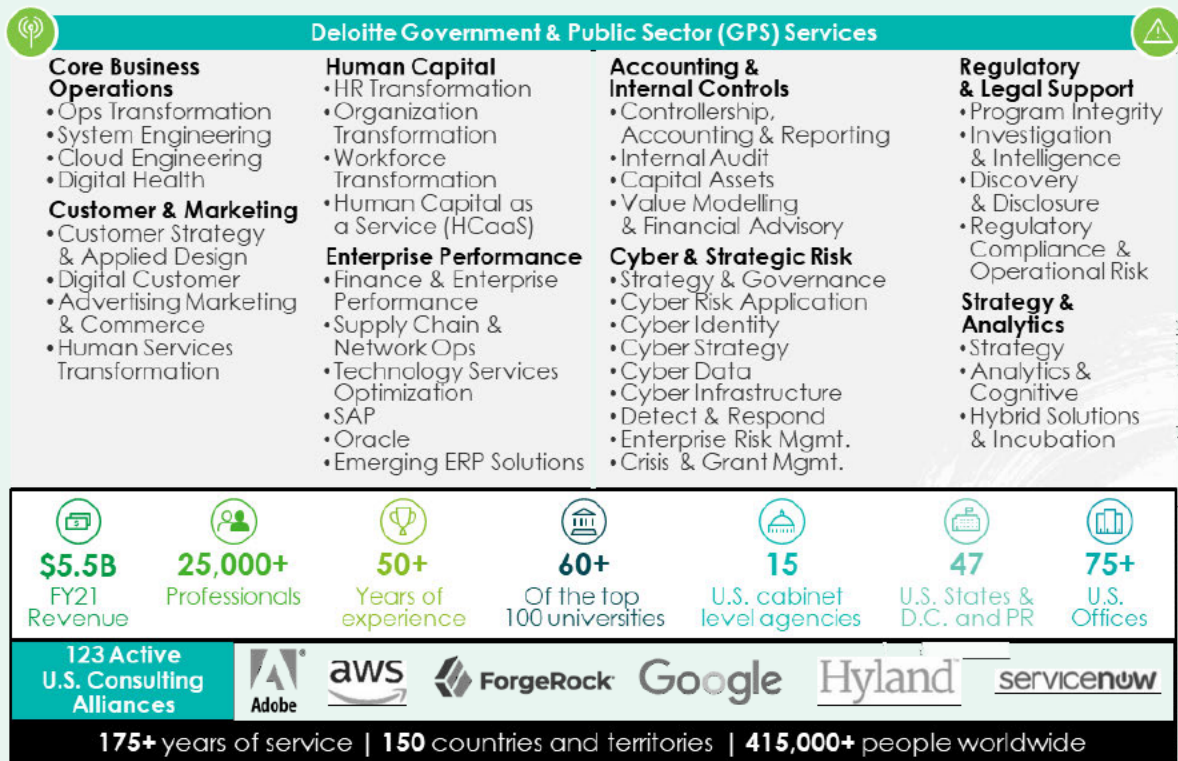
**Why it matters:** The Consortium has more agility to handle those changes by having Deloitte's diverse and analyst-acclaimed capabilities at its side.

When this contract was last procured, the iPad had not yet been released, Alexa was just a trendy name for baby girls, EBT cards did not exist, and most people usually referred to a "cloud" when it looked like it was going to rain. Technology is advancing rapidly; it's changing societies and, by extension, people's preferences, and desires. Similarly, Federal and State policy has rapidly been increasing, with expectations to meet political and societal challenges. Since the insurgence of Covid, a new normal has been established with high expectations around quick implementation of policy and technical prospects.

The Consortium should have a vendor who keeps up in this ever-changing environment. Deloitte is that vendor with the capabilities in Figure 1-5. We have been helping clients since 1845 (no, that isn't a misprint). When CalSAWS picks Deloitte, it doesn't just get people on its project. It obtains the full support of our multi-dimensional firm.

S.W.K.N.O.W  
DID YOU

- Deloitte is a globally connected network of member firms in more than 150 countries.
- The largest professional services firm in the world (based on revenues and headcount).
- More than 330,000 employees serving 82 percent of the world's largest companies (Global Fortune).
- 130 offices in more than 100 U.S. cities.



**Figure 1-5. All the Capabilities CalSAWS Needs to Keep Pace with the World.**

## A diverse, experienced team that knows how to deliver both E&E innovation and CalSAWS operational continuity.

**Why It Matters:** The Consortium meets increasing stakeholder expectations without risk from our team's ability to help CalSAWS color outside the lines.

Great teams happen when driven, high-performing, experienced people come together and rally toward a common vision. That's our team! People you know, people you've worked with over the years, people who can jumpstart the CalSAWS architecture evolution and help you color outside the lines. Our key staff average over 15 years of experience in their proposed responsibility areas, as shown in Figure 1-6. Understanding of E&E innovation, knowledge of the CalSAWS Consortium, and vast experience with E&E system maintenance and enhancement programs are just a few of the strengths our diverse team offers.



DID YOU KNOW?

- Our proposed staff bring over 240 years of experience with E&E systems like CalSAWS.
- Six key personnel with:
  - 77+ years of California delivery experience.
  - 280+ years of system maintenance and enhancement experience.
- Over 4,000 staff implementing E&E systems nationally to support CalSAWS.

**Figure 1-6. A Diverse, Experienced Team to Help the Consortium Succeed.**

### The Team to Help You Color Outside the Lines

 <b>Project Manager</b> Rakesh Duttagupta 	 <b>Technical Manager</b> Jerry Nielson 	 <b>Transition Manager</b> Mike Henry 	 <b>Enterprise Architect</b> Lori Olson 
 <b>PMO Lead</b> Donna Cain 	 <b>Advisor/Business Unit Leader</b> Rachel Frey 	 <b>Deputy Project Manager</b> Duncan Gilliam 	 <b>Project Scheduler</b> Robert Daffin 
 <b>Delivery Integration Manager</b> Kishan Mallur 	 <b>Application Manager</b> Surranjan Kumar 	 <b>Innovation Lead</b> Roberto Cota 	 <b>Innovation Advisor</b> Phong Huynh 
 <b>Security Officer</b> Debi Mohanty 	 <b>Release Manager</b> Kimberle Buchter 	 <b>Testing Manager</b> Mufaddal Tinmaker 	 <b>Stakeholder Advisor</b> Frank Mecca 

**280+ YEARS**  
combined M&E  
experience

**178+ YEARS**  
combined HHS  
experience

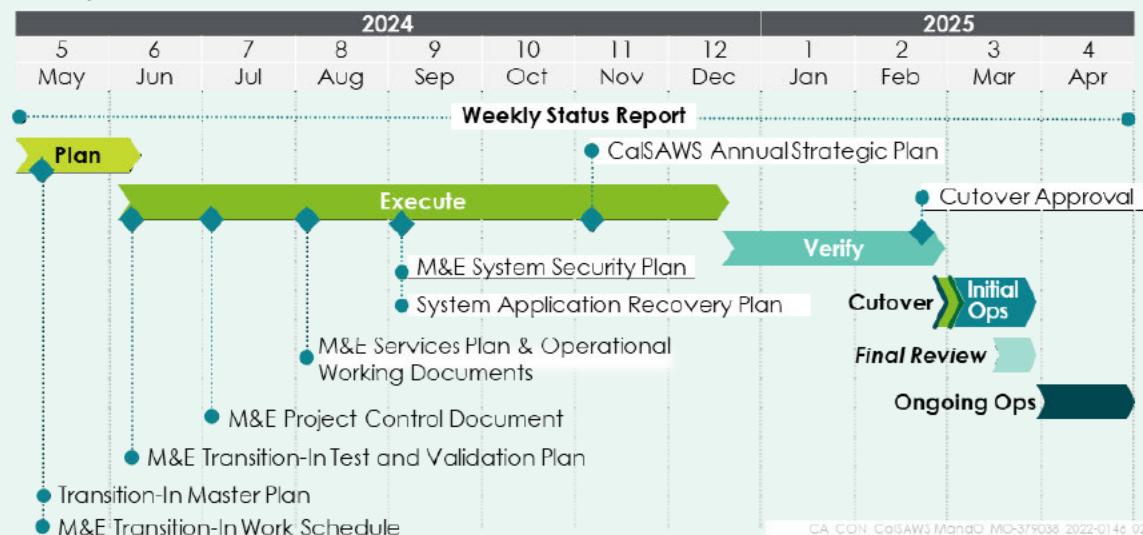
**77+ YEARS**  
combined CA  
experience



## A proven, low-risk approach to transition, as California has seen firsthand helps the Consortium challenge the status quo, innovate, and improve its operations and those of the Counties.

**Why it matters:** Moving forward with Deloitte allows the Consortium to challenge the status quo more so than remaining with its incumbent. Choosing Deloitte will provide the Consortium with contemporary ideas that will aid, in meeting its goals to evolve CalSAWS, improve delivery integration, and better meet Counties' needs.

Deloitte brings to the Consortium a combination of experience on similar system transitions, a proven methodology and tools, and a highly motivated and talented team that knows how to exceed your expectations in transitioning CalSAWS. Our team hits the ground running with a deep understanding of California's human service programs, current technical stack and the project environment. We don't wait until the operations period to identify process improvement and innovation opportunities. As highlighted in Figure 1-7, we begin immediately at the start of the transition period to discover and document our findings for Consortium's consideration. Our proven transition approach enables us to assume M&E responsibilities safely and effectively from your incumbent.



**Figure 1-7. A Realistic, Compliant, and Experienced Approach to Transition.**

We have completed very similar transitions on time and within budget and bring a very experienced team with knowledge of transition, E&E, M&E, and the CalSAWS environment. Our transition team is led by Michael Henry, who has experience with multiple transitions including the CalHEERS project, the Federal General Services Administration, and Oregon's ONE Medicaid program. Additionally, 50% of our key staff and leadership team (i.e., Debi Mohanty, Jerry Nielson, Surranjan Kumar, Duncan Gilliam, Mufaddal Tinmaker, Kishan Mallur and Rachel Frey) will bring working CalSAWS knowledge to the contract through BenefitsCal and CalWIN ISS experience.

## Proactive, long-term planning and risk mitigation to continually exceed California Counties' expectations.

**Why It Matters:** The Consortium cements its reputation as an innovative, mature, customer-focused organization that efficiently serves Counties as they serve Californians.

As we put together our approach to delivering CalSAWS M&E services, we identified the following top risks (Table 1-1). These risks informed our proposed M&E delivery approach for the Consortium.

Top Risks	How Deloitte Mitigates This Risk for the Consortium
<b>Consortium stakeholders and processes continue to default to the status quo (bulky, costly, less responsive) due a lack of a catalyst for change driving a lack of confidence Federal and State Stakeholders</b>	We deliver a diverse team with both California and national experience (more than 12 states). They are not tied to the status quo. They bring different viewpoints and approaches that have worked in complex E&E environments such as CalSAWS. This enables us to use the transition-in period to help the Consortium re-evaluate its processes now to drive the implementation of policy quicker and cost efficient by challenging the status quo.
<b>The CalSAWS architecture evolution fails to meet the Consortium's goals, worsens CalSAWS instability and usability, and/or increases long-term cost of ownership</b>	We use a realistic seven-month road-mapping approach that enables the Consortium to validate our proposed evolution approach, consider its program and policy priorities, and deliver a multi-year roadmap to get the Consortium where it wants to go. We also pull in cloud-native SMEs, AWS alliance staff, and E&E specialists from across our 26 current E&E system projects to inform this approach.
<b>Stagnation of CalSAWS from being unable to manage the tradeoffs between a single statewide system and California's county-owned delivery model</b>	We said it earlier: "California is more like a country than a state." Some things have worked during the migration; others haven't. This contract change provides an opportunity to color outside the lines. We inclusively evaluate with the Consortium and the Counties how CalSAWS governance, prioritization, and communication processes work to reconcile the multiple competing demands placed on one statewide system.
<b>CalSAWS performance degradation and availability issues due to poor system design, performance testing, and lack of true E&amp;E functional and county understanding</b>	We extend the successful and well-received Human-Centered Design (HCD) processes we used on BenefitsCal to the broader CalSAWS ecosystem. We use it to better inform decision-making across all phases of the SDLC. This enables our team to fix the right problems with the right designs, and make sure those designs are properly load-tested for performance.

**Table 1-1. Risks and How Deloitte Mitigates Them.**



## Deloitte is the best vendor to help the Consortium color outside the lines to achieve its goals.

**Why it matters:** The Consortium is NOT making a leap into the unknown. It knows Deloitte and what it brings to the table. It can feel confident it is making the right decision.

As you review other vendors' proposals, we ask you to consider the following questions:

1

Who is best positioned to help the Consortium think, and do things, differently and better?

It is clear from our reading of the RFP that the Consortium is not content with the status quo. Things take too long to get done. CalSAWS is unavailable more often than it should be – partly due to architectural decisions. The Consortium's vendors are at times not working as one integrated team. Deloitte has seen this firsthand but is not part of the status quo. We can be the change agent the Consortium needs to do things differently and better. **Change is how you grow. Deloitte helps you grow.**

2

Do you want to go it alone?

It is clear to us from delivering BenefitsCal for the past two years that the Consortium's incumbent CalSAWS vendor is siloed from the national HHS landscape. Experience is largely limited to California. Deloitte brings an integrated, national E&E practice that is constantly sharing ideas and approaches to solving our clients' problems. This is evidenced in our proposed team who bring diverse experience from 12 states. It's that type of **experience that helps us help you color outside the lines.**

3

Are you happy with CalSAWS' availability and performance?

We currently deliver 26 E&E systems. None of these systems has anywhere near the performance issues as CalSAWS. As your BenefitsCal vendor, we have witnessed first-hand CalSAWS capacity planning and performance testing challenges with the imaging system and environment conflicts that lead to delays in delivery. This record of performance is at the heart of being a quality application maintenance and enhancement vendor. We don't think the Consortium is getting the level of application operation service it deserves for the price it pays. **The Consortium deserves better.**

4

Is your CalSAWS vendor going to be a trusted advisor, or an order-taker?

The Consortium spends a lot of money operating CalSAWS. It's a complex system in a complex stakeholder environment. Simply stated, it is not an easy environment in which to be successful. Success requires constantly thinking ahead holistically. Deloitte has multiple, multi-decade relationships with E&E clients because we are not simply order-takers and will not always agree. We are constantly thinking ahead. That's why we're trusted. You can trust we are **always thinking about your success.**

# M&E Firm Qualifications: Firm Experience Details

## Section 2A

### RFP Reference: 6.3.8.4 Section 2 – Firm Qualifications: Firm Experience Details

The Firm Qualifications Section shall provide a narrative with information that provides the Consortium with a basis for determining Contractor financial and overall capabilities to undertake a contract of this size and complexity. Bidders will respond to all Firm Qualifications contained in Section 5.3.1 - M&E Firm Qualifications.

**The Consortium evolves CalSAWS faster, improves speed of System Change Request (SCR) delivery, and improves delivery integration by teaming with the firm with more statewide Medicaid, SNAP, and TANF system delivery and operations experience than all other vendors combined. Deloitte brings analyst-acclaimed capabilities and proven solutions from our E&E network of 26 states, alongside our CalSAWS environment and system understanding, to meet the needs of the Consortium and Counties and enhance the experience of customers in need of assistance.**

The Consortium has ambitious goals for where it wants to take CalSAWS after the CalWIN migration completes over the next contract period. To be successful, things need to change with an infusion of proven ideas, approaches, and experienced people to help color outside the lines. Deloitte is the best vendor to do this with the Consortium due to our unparalleled experience delivering **application maintenance and system modifications, operating E&E systems, transitioning Maintenance and Enhancement (M&E) services, and working with multiple contractors on large complex IT projects** to deliver reliable and innovative systems. An overview of our qualifications and capabilities are represented in the column to the right.



## SECTION HIGHLIGHTS

Extensive experience in all facets of M&E services to maintain CalSAWS, including:

- 26 active Medicaid, TANF and SNAP Eligibility and Enrollment (E&E) projects like CalSAWS.
- 20 years of experience implementing and managing E&E systems in California.
- Management of E&E systems delivering over \$40B in benefits annually and serving 40M+ customers.

## Deloitte.

*Impact that Matters*

### GOALS



Embrace Evolution



Pursue Optimization



Maximize Agility



Reduce Risk

### QUALIFICATIONS AND CAPABILITIES OVERVIEW

**50+** years serving California

**50+** years of Health and Human Services (HHS) experience

**4k+** practitioners specializing in E&E Delivery

**50k+** Operate practitioners

**26** current E&E M&E clients

**20** large and complex system transitions

**Ranked #1**

in Security Consulting

**Ranked as the Leader**

in Public Cloud IT Transformation Services

## How the Remainder of this Section is Organized

### 2A.1 Firm Experience Details

- 2A.1.1 Relevant Firm Experience Details
- 2A.1.2 Narrative Description of M&E Related Capabilities
- 2A.1.3 Mandatory M&E Firm Qualifications
- 2A.1.4 M&E Firm References



## 2A.1 Firm Experience Details

### RFP Reference: 6.3.8.4.1 Firm Experience Details

Bidders will provide details of firm Prime Contractor experience relevant to the proposed M&E Services within at least the last 10 years within the form in **Attachment B8 – Firm Qualifications**. A concise but thorough description of relevant experience is desired.

The Contractor shall also provide a general narrative description highlighting the Contractor's M&E Services experience and capabilities.

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 in the CalSAWS M&E Project. The organization chart must include names and be dated. The Contractor shall supply any additional information not already presented in this Section, which the Bidder believes to be relevant to the Consortium's assessment of the Contractor's experience regarding the specifics of this RFP. The Contractor shall each provide two references within **Attachment B9 – Firm References** format. Each reference must clearly indicate the reference entity.

Complete details of Deloitte's Prime Contractor firm experience within the last 10 years can be found in **Attachment B8 – Firm Qualifications**. A narrative of Deloitte's relevant experience across M&E services and capabilities is provided in the sections below.

### 2A.1.1 Relevant Firm Experience Details

#### RFP Reference: 6.3.8.4.1 Firm Experience Details

Bidders will provide details of firm Prime Contractor experience relevant to the proposed M&E Services within at least the last 10 years within the form in Attachment B8 – Firm Qualifications. A concise but thorough description of relevant experience is desired.

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With our global footprint, we have the knowledge and resources available at our fingertips to help accelerate our work with you. Deloitte is the world's largest professional services firm with over 415,000 staff worldwide and 156,000 staff in the US. We are a full service, multi-functional organization providing audit, tax, consulting, risk, and financial advisory services. Along with comprehensive consulting services and capabilities, we bring a collaborative culture that enables client service teams to draw across functions and industries to deliver solutions tailored to your needs.

Our goal is to provide the knowledge, judgment, and experience to help clients address challenges they face in serving their populations, whether it is integrating innovative technologies, rethinking access to services, inventing ways to streamline processes, or finding ways to facilitate partnerships. Together, we help clients tap into their full potential for them to move forward with confidence, deliver the best service possible, and provide innovative outcomes that make an impact in HHS services, jobs, security, infrastructure, education, and the lives of the customers served. Our qualified staff bring to California the breadth and depth of our global firm and national experience, as highlighted in Figure 2A-1 below, to achieve your goals and objectives.

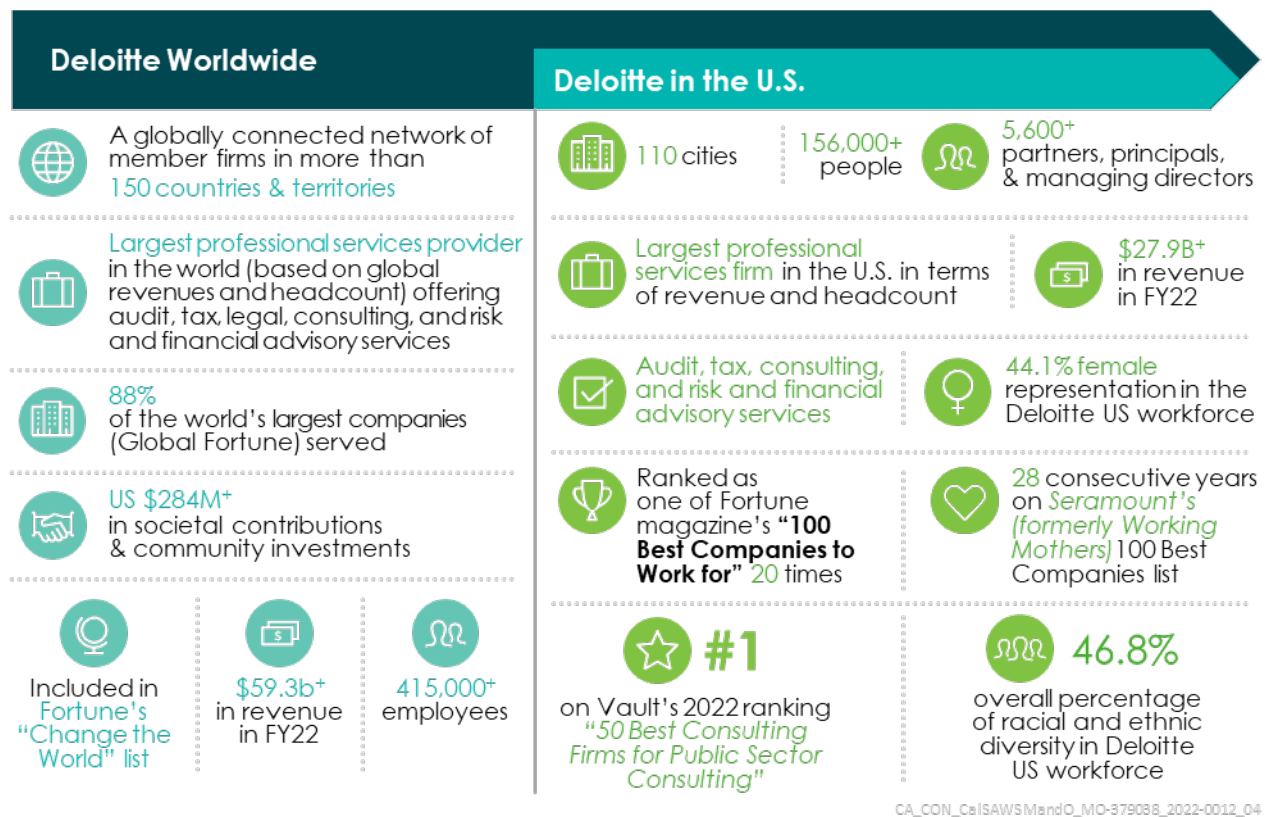
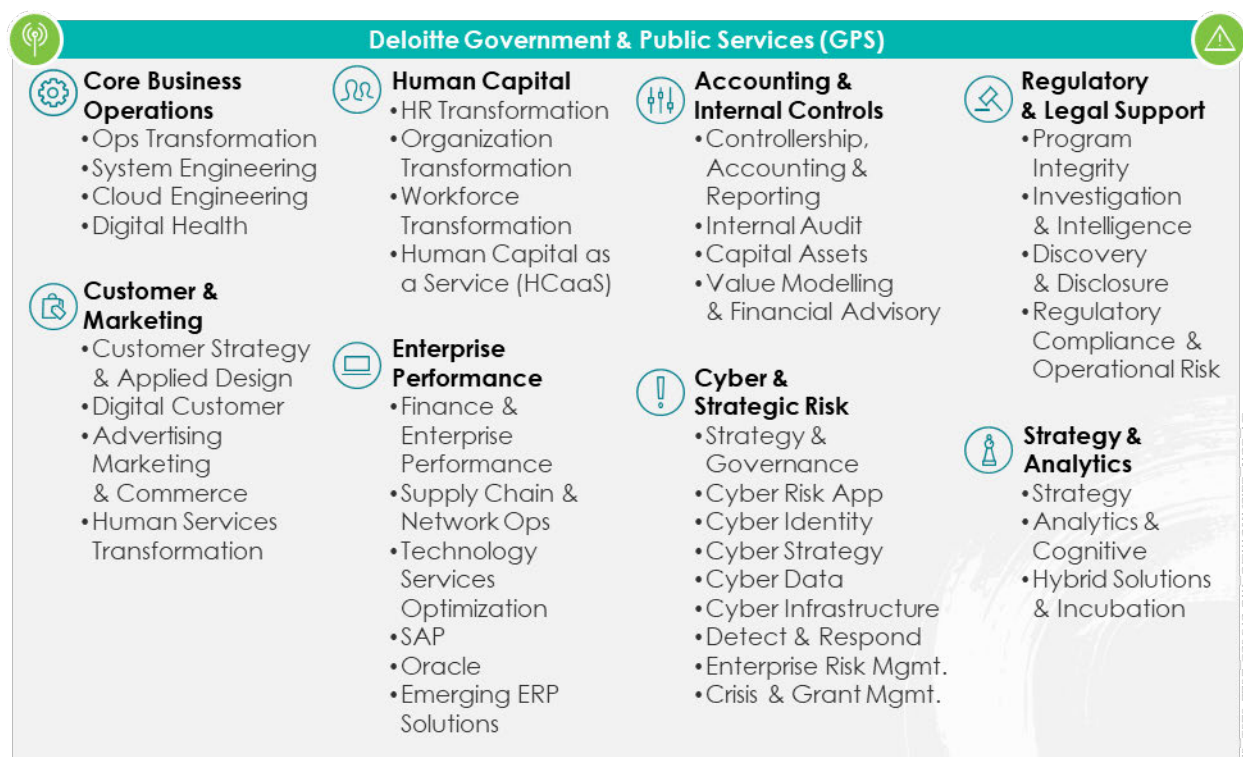


Figure 2A-1. Deloitte Worldwide and in the United States.



## 2A.1.1.1 Our Government & Public Services Practice

Through our work in the government sector and specifically serving the State of California, we are in tune with the challenges and opportunities facing government agencies. Deloitte's national Government and Public Services (GPS) practice consists of more than 25,500 consulting and advisory professionals across the country serving federal, state, and local government and higher education clients. In our GPS practice, we have more than 4,000 individuals specializing in E&E delivery. We assist clients with a diverse set of business needs, and we also bring a broad array of complementary practices like Digital Government, Cyber and Strategic Risk, Cloud Engineering, Analytics, Organizational and Operational Transformation, Talent Development, Advertising and Marketing, and Regulatory and Legal Support to holistically support the implementation, and M&E of government platforms. Our professionals serve all 15 US Cabinet-level agencies, 49 states, the District of Columbia, and over 60 of the top 100 universities. A summary of our GPS services is detailed in the following, Figure 2A-2.



**Figure 2A-2. Deloitte Government & Public Consulting Services.**

Our firm is consistently recognized as a leader in system integration and business transformation by Forrester, Gartner, and others in government services consulting. As a trusted advisor to many of the largest government agencies, we understand the intricacies clients must navigate and the growing pressure they face: the need to increase efficiency, streamline processes, and stay current with the latest technology and business practices so they can operate more effectively and deliver higher value to customers. Equipped with lessons learned from serving GPS organizations for over 50 years, our

experienced professionals apply industry-leading practices in strategy, scenario planning, operations improvement, technology innovation, human capital, and outsourcing.

We continually invest in our staff who have a blend of industry knowledge, business acumen, and technical expertise necessary to meet the needs of GPS organizations. We have delivered tremendous impact across the spectrum of government and higher education sectors, including with clients like the University of Arkansas, Southern New Hampshire University, US Agency for International Development (USAID), New Mexico Human Services Department, [REDACTED]

**BUILDING TRUST**

"Deloitte continues to expand its portfolio of services and solutions in response to business needs across the functional areas of the organization, growing technology and asset investments while focusing on efforts to retain resources."

*Vendor Rating for Deloitte, By Chrissy Healey, Craig Lowery, Brendan Williams, Katie Gove, Gary Spivak, Published 18 April 2022*

[REDACTED] depicted in the following, Figure 2A-3.



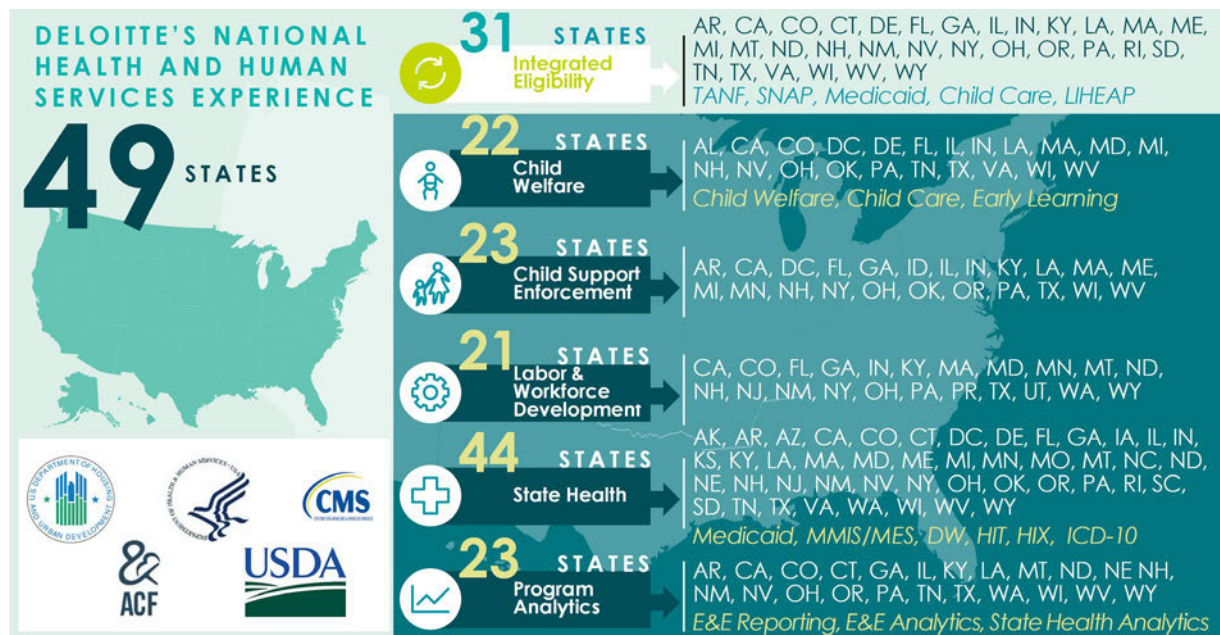
CA\_CON\_CalSAWS M&O\_MO-379038\_2022-0103

**Figure 2A-3. Deloitte U.S. GPS Client Impact.**

Along with comprehensive solutions and strong capabilities, we bring a collaborative culture that enables client service teams to draw across functions and industries to deliver solutions tailored to your needs. We know federal, state, and local government and higher education; we speak the same language and bring understanding of the complexities of what our clients do and how they do it. Our goal is to provide the knowledge, judgment, and experience to help you address the most complex challenges you are facing in serving your constituents, whether it is integrating innovative technologies, rethinking access to services, inventing ways to streamline processes, or finding ways to facilitate teaming relationships. Together, we help clients tap into their full potential and move forward with confidence and deliver the best service possible, providing innovative outcomes that make positive impacts.

## Our Health and Human Services Experience

Our experience in HHS is unmatched by any other vendor in the market. Deloitte is the market leader in HHS and provides services that includes project management, systems integration, maintenance, operations, enhancements, testing, training, business intelligence, data analytics, service desk, and infrastructure to systems with the comparable size and complexity to CalSAWS. We are proud of the work we have accomplished with our clients to design, implement, deploy, maintain, and operate their portfolio of applications while continuously enhancing and modernizing them. Figure 2A-4 illustrates our extensive experience in the HHS domain.



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**Figure 2A-4. Deloitte Health and Human Services Experience.**

Deloitte has transitioned into the role of M&E vendor for 20 large, complex enterprise-level federal, state, local, and commercial systems, including 12 in the HHS sector, as listed in Figure 2A-9. This experience includes transitions from your incumbent vendor and its subcontractor in Texas, Colorado and California. Our knowledge of systems like CalSAWS



acquired through our work with BenefitsCal, CalWIN ISS and other states, combined with our national HHS business and technology experience, present California with a skilled team to provide exceptional services in alignment with the Consortium's strategic vision. We bring successful HHS business experience coupled with our ability to smoothly transition systems from other vendors and our capability to manage complexity. This provides California the combination of system continuity and national innovative practices necessary to meet the vision and goals for CalSAWS—a depth of experience no other vendor can offer.

## Strategic Cloud Provider and Vendor Alliances

As a leader in the IT modernization space, Deloitte maintains numerous strategic alliances with leading technology companies which provide our team with access to a wide variety of technology subject matter specialists. Additional Cyber/Infrastructure alliances include Cisco, Splunk, ServiceNow, and Symantec. We also built practices providing expertise in the leading cloud platforms, including AWS (Deloitte is a premium consulting partner and certified managed service provider), Microsoft Azure, Google Cloud Platform, and Oracle Cloud. Our AWS cloud vendor relationship will bring immense benefits to CalSAWS. A summary of Deloitte's cloud product and vendor relationships are listed in Figure 2A-5 below.



CALCON CalSAWS Memo ID: MCO-379008, 2022-007.3, 03

Figure 2A-5. Deloitte Cloud Product and Vendor Relationships.

These alliances and practices help us provide our clients with industry-best solutions aligned to their business needs and objectives as well as their operating environments. Given our understanding of client needs and the strategic relationships held with these essential technology providers, Deloitte can effectively be a voice of the client to influence future capabilities that will evolve with business needs. Deloitte makes significant investments, with a continual emphasis on certifying our practitioners and developing subject matter expertise. Finally, we are active in the standards communities to train our staff, and we have built, for example, a 1,400-person certified ITIL practice. These relationships combine our broad business knowledge with innovative technologies to enhance IT agility for our clients. Deloitte's focus on business strategy, business transformation, and IT modernization can be used with these technology partners to bring significant business value.

### 2A.1.1.2 Our Commitment to California

For over 50 years, Deloitte has collaborated with California departments and agencies to help them realize their goals and objectives. We solve complex business and program challenges, deliver vital services and benefits, and make a real impact for millions of Californians. With 10 offices throughout the state, Deloitte has more than 8,000 employees who live and work here—and half of them are graduates of California colleges and universities. Deloitte combines industry knowledge with a breadth of services that instill confidence in our State clients and help them provide responsive, high-quality service to their constituents. We are proud of the jobs we have created in California and the positive impact our employees make in their communities as taxpayers, volunteers, and strategic business teammates.

We have successfully completed projects with over 30 agencies and departments and all of California's 58 counties during our long-standing relationship with California. Our services have included project management and change leadership as well as systems design, development, implementation, cyber risk, program integrity, and M&E. Figure 2A-6, below, illustrates examples of our commitment to California.



Figure 2A-6. Deloitte in California.

Combined with industry leadership, Deloitte also brings over 20 years of experience in implementing and managing E&E systems in California, including implementation of CalWIN, ISAWS, and the original Los Angeles LEADER system, in addition to our current delivery of California's statewide E&E public portal, BenefitsCal and CalWIN ISS services. We know California technology and culture, and we know how to successfully work with you to use innovation and enhancements to make CalSAWS a model in eligibility systems, while minimizing disruption and maximizing continuity.

## **California Community Involvement**

In addition to working for departments and agencies in California, our professionals serve on boards and raise funds for many California charitable organizations such as the Court Appointed Special Advocates (CASA), Children Now, the United Way, the Sacramento Children's Home, Catholic Charities, and the Sacramento Food Bank and Family Services. We also hold an annual Impact Day across the State. Impact Day is Deloitte's annual day of service that celebrates our year-round commitment to making an impact that matters. In the past, we collaborated with clients and nonprofits to help demonstrate the power of a shared community. To celebrate Deloitte's annual Impact Day in 2022, Deloitte professionals in 80+ locations participated in 1000+ projects for the community, including:

- Painting murals at the Carr Intermediate School in Santa Ana, CA.
- Packing meal boxes at the Central California Food Bank in Fresno, CA.
- Packaging and distributing fresh food at the Logan Heights Community Development Corporation near San Diego, CA.
- Cleaning up outdoor spaces at the Oakland Animal Shelter in Oakland, CA.

By harnessing the collective power of our people, clients, and nonprofits every year on Impact Day and year-round, we can develop innovative solutions around pressing social issues and help achieve lasting social impact—for the greater good. This is what we bring to California and nationally.

### **2A.1.1.3 Firm Organization Chart**

#### **RFP Reference: 6.3.8.4.1 Firm Experience Details**

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 in the CalSAWS M&E Project. The organization chart must include names and be dated.

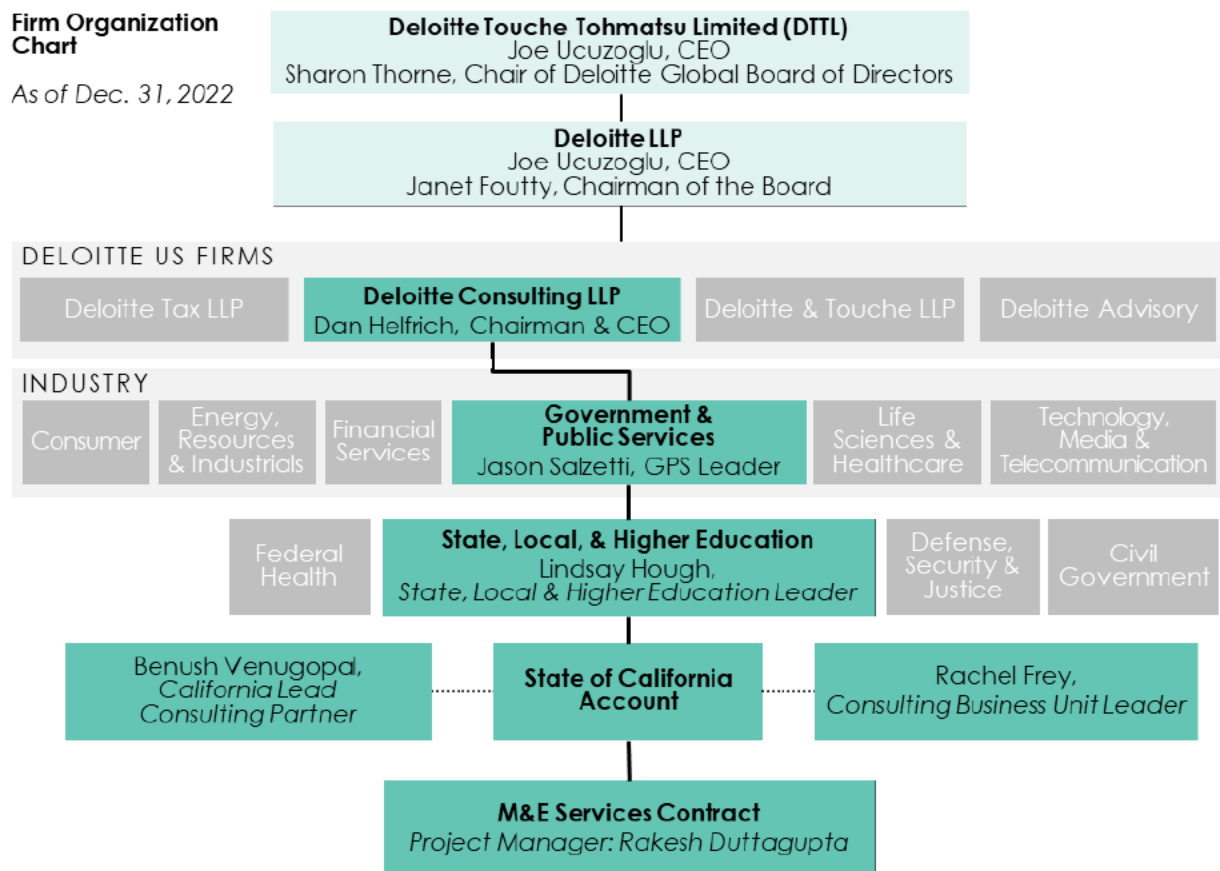
**We are trusted, not because we have existed for 175+ years, we are trusted because we are trustworthy. That is why clients choose Deloitte.**

Deloitte has spent the last 175+ years making an impact that matters. It is an enduring story that began in 1845 with William Welch Deloitte—an individual with the idea, the integrity, and the incentive to build something that would last. It was the start of a thriving global organization which has grown to more than 415,000 people who proudly

carry forth a legacy of connection and collaboration. Being an organization with the multidimensional perspectives necessary to solve the world's greatest challenges in business and society remains the DNA of today's Deloitte.

Deloitte Consulting Limited Liability Partnership (LLP) became an LLP in Delaware in 2003 and is the world's largest professional services organization. Our Chairman and Chief Executive Officer is Dan Helfrich. Our board of directors maintains general authority and supervision over the management, practice, and affairs of Deloitte Consulting LLP and establishes its various policies. Deloitte Consulting LLP is a subsidiary of Deloitte LLP, which is also a limited liability partnership registered in Delaware. Deloitte LLP is the US member firm of Deloitte Touche Tohmatsu Limited (DTTL), a United Kingdom private company limited by guarantee.

The following, Figure 2A-7, depicts this firm structure as an organization chart and the organizational placement of the CalSAWS M&E Project.



CA\_CON\_CalSAWS Memo\_MJO-379038\_2022-0011.04\_MemoE

Figure 2A-7. Firm Organization Chart.



## 2A.1.2 Narrative Description of M&E Related Capabilities

### RFP Reference: 6.3.8.4.1 Firm Experience Details

The Contractor shall also provide a general narrative description highlighting the Contractor's M&E Services experience and capabilities.

We have the capabilities required, as outlined in Attachment B8, and we also bring several value-added experience and capabilities that we have demonstrated over the past 10 years of experience. In Table 2A-1, we have also provided a list of projects in 26 states where we meet the CalSAWS M&E Experience Requirements. Figure 2A-8 below provides client testimonials for our work, meeting CalSAWS M&E requirements.



Figure 2A-8. Deloitte's Proven Experience to Meet CalSAWS Needs.

System/ Project Name	Transition-In/Out	Management	System Change Request	M&E Support Services	Application/Architecture Evolution	Innovation Services	Production Operations	Technology Recovery	Security
Arkansas ARIES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Arkansas ISS	✓	✓	✓	✓	✓	✓	✓	✓	✓
California CalHEERS	✓	✓	✓	✓	✓	✓	✓	✓	✓
Colorado CBMS	✓	✓	✓	✓	✓	✓	✓	✓	✓
Delaware DE ASSIST		✓	✓	✓	✓	✓	✓	✓	✓
Florida IE O&M	✓	✓	✓	✓	✓	✓	✓	✓	✓
Georgia GA IES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Indiana IEDSS	✓	✓	✓	✓	✓	✓	✓		✓
Kentucky IEES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Louisiana LAMEDS/LITE	✓	✓			✓		✓	✓	✓
Maine ACES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Michigan BRIDGES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Montana CHIMES-EA	✓	✓	✓	✓	✓	✓	✓		✓
Nevada IES	✓	✓	✓	✓	✓	✓			✓
New Mexico ASPEN	✓	✓	✓	✓	✓	✓	✓	✓	✓
New Hampshire New Heights		✓	✓	✓	✓	✓	✓	✓	✓
North Dakota SPACES	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oregon ONE	✓	✓	✓	✓	✓	✓	✓	✓	✓
Pennsylvania CAPS/CIS	✓	✓	✓	✓	✓	✓	✓	✓	✓
Rhode Island BRIDGES		✓	✓	✓	✓	✓	✓	✓	✓
Tennessee TEDS/EBMS		✓	✓	✓	✓	✓	✓	✓	✓
Texas TIERS		✓	✓	✓	✓	✓	✓	✓	✓
Virginia VaCMS	✓	✓	✓	✓	✓	✓	✓	✓	✓
Wisconsin CARES		✓	✓	✓	✓	✓	✓	✓	✓
Wyoming WES	✓	✓	✓	✓	✓	✓	✓	✓	✓

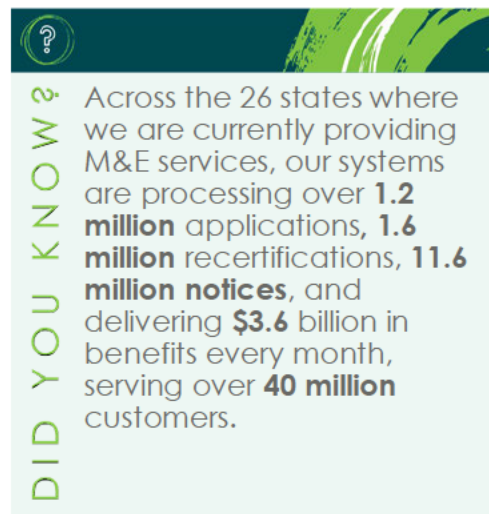
**Table 2A-1. Deloitte M&E Experience.**

## 2A.1.2.1 Application Maintenance and System Modifications (ME-F1)

**You can trust Deloitte to optimize system performance and deliver innovation for CalSAWS with our expansive M&E service experience in the HHS sector. Our approach to collaboration will keep you informed and, on the path, to meet your goals.**

Our approach to M&E features measurable and predictable service delivery and support. We focus on a transparent, collaborative, and mission-driven approach to provide uninterrupted high availability and system performance. **We currently provide application maintenance and system modification services specific to Medicaid, SNAP and TANF E&E solutions, like CalSAWS, in 26 states** that leverage our reliable toolset and our experienced teams. We additionally provide application maintenance of **hundreds of other solutions for state and federal agencies, and for Fortune 500 companies.**

For example, in Colorado, the State has witnessed significant improvements in system performance and stability, [REDACTED] since we took on the responsibilities for M&E. We are proud that we promptly stabilized the system and built a foundation to support future enhancements and growth. When we first took over the system from the same vendor that maintains CalWIN today, there was a per-month average of 40 issues related to poor system performance. The system now has a per-month average of less than one issue related to performance. Although the system has grown significantly, we have not increased maintenance efforts and costs by implementing proven processes, accelerators, and automation.



**DID YOU KNOW?** Across the 26 states where we are currently providing M&E services, our systems are processing over **1.2 million** applications, **1.6 million** recertifications, **11.6 million** notices, and delivering **\$3.6** billion in benefits every month, serving over **40 million** customers.

Our baseline approach for M&E is rooted in:

- The way we collaborate with you to understand your priorities and organize our teams and efforts to align with your priorities.
- The way we collaborate across our firm, where we work with our other teams leading E&E system efforts for other states.
- The way we leverage our policy and technical experts, who are involved in the creation and analysis of policy that is built into these programs.

We focus on maintaining system stability, maximizing reliability, and minimizing downtime, while allowing you to gain efficiencies by providing more work with the same staffing capacity over time. Achieving this takes more than a vendor who understands how to provide M&E services; it takes a vendor who understands your business and extends lessons learned in M&E to achieve your strategic vision. Our



approach to the CalSAWS M&E services contract leverages the rigor and discipline of our methodology and combines it with our expertise in developing and maintaining human services systems across the country. This allows us to meet your critical objectives while addressing the specific needs of each task, covering activities from project initiation, transition, and project transformation through M&E.

## 2A.1.2.2 Operational Activities (ME-F2)

**We have successfully delivered operational support of systems of similar scope and scale as CalSAWS. Deloitte's Operate Services offering and intelligent OperateEdge platform set us apart in helping our clients plan, test, and monitor their systems while driving future innovations.**

Deloitte's Operate Services harness the power of people, innovation, and technology to run, improve, and optimize our clients' operations, allowing renewed focus on mission enablement and innovation. We support organizations with similar scope and scale in remaining dedicated to meeting program outcomes while incrementally modernizing legacy systems, improving existing workflow and processes to achieve efficiencies and workforce flexibility, and to prioritize innovation and reduce operational costs. Our Operate Services include any work where we are running, maintaining, or innovating a system, function, or process on behalf of our client organization, for an extended period.

Most engagements will include a combination of more than one Operate service. Services include:

- **Application Management and Foundry Services** – Application Management Services provide break-fix maintenance, monitoring, and optimization services for an organization's technology applications and platforms in a predictable manner with service level assurances. Foundry Services bring a flexible and fluid capacity model to the delivery of technology projects and enhancements.
- **Infrastructure and IT Operations Services** – We configure, control, and monitor IT infrastructure for our clients. We also manage the creation, deployment, operations, maintenance, and improvement of IT services using data-driven methodologies and aligning with ITIL best practices.
- **Insights and Advise Services** – Insights and Advise Services couple deep subject matter knowledge and experience with technical differentiators on a recurring, "as-



**In Texas,** Deloitte worked with the State to transform the Texas Integrated Eligibility Redesign System (TIERS) and achieved savings of over \$16M/year in operational costs, achieved faster market for new services, and maximized self-service adoption.

**In Pennsylvania,** the Deloitte-CenturyLink team helped the client keep up with new security threats and develop a robust incident management response program.

a-service" basis to produce and operationalize recommendations that improve our clients' business outcomes.

- **Business Process Enablement Services** – Business Process Enablement Services supply value-driven, ongoing management of business processes, often enabled by market differentiated assets. We also provide data analytics and operations in an as-a-service model, and we provide ongoing support for interactive applications tied to the data.

Deloitte's Operate Services help state and local government and higher education clients embrace change and adopt fresh ways of thinking on how they run, manage, innovate, and enhance day-to-day operations—accelerating digital modernization and innovation while minimizing disruption.

### 2A.1.2.3 Large Complex IT Systems (ME-F3)

**Deloitte is highly experienced in working with multiple stakeholders on large and complex IT system projects. Our approach to multi-stakeholder engagement supports broad collaboration to accelerate your goals.**

Deloitte has substantial experience providing M&E services for large and complex E&E systems. In the following, Table 2A-2, we highlight 6 examples that represent our experience providing M&E services for large systems, each supporting over 1,500 users and over 1 million records annually for current and prior recipients, historically denied applicants, and corresponding technical components to handle this capacity for intake, processing, batches/interfaces, and reporting. The table also highlights many of the technical and business metrics that demonstrate the size and complexity of E&E systems Deloitte serves. This experience prepares us well to take on CalSAWS M&E Support.

	Indiana IEDSS	Texas TIERS	Michigan BRIDGES	Wisconsin CARES	Pennsylvania CAPS/CIS	Louisiana LaMEDS/LITE
<b>Prime Contractor</b>	✓	✓	✓	✓	✓	✓
<b>≥ 3 Contractors</b>	✓	✓	✓	✓	✓	
<b>Client processed (per year)</b>	2,656,428	12,273,643	2,694,712	3,174,631	3,771,889	5,089,126
<b>Programs Supported</b>	Medicaid, SNAP, TANF, IMPACT, Burial Programs	Medicaid, SNAP, TANF	Medicaid, SNAP, TANF, LIHEAP, Child Development Care	Medicaid, SNAP, TANF, Child Care	Medicaid, SNAP, TANF, Child Care	Medicaid, SNAP, TANF
<b>Users</b>	4,400+	9,000+	5,000+	8,000+	7,200+	2,600+
<b>Interfaces</b>	185	250+	162	130	200+	330+
<b>Batch Programs</b>	599	580	1,833	2,500	6,200	1,800

	Indiana IEDSS	Texas TIERS	Michigan BRIDGES	Wisconsin CARES	Pennsylvania CAPS/CIS	Louisiana LaMEDS/LITE
<b>Correspondence (per year)</b>	10 million	47.9 million	12 million	12.5 million	10.3 million	6.4 million
<b>Tasks Comp. (per year)</b>	4.9 million	20.2 million	9.5 million	1 million	25.8 million	2.1 million
<b>[REDACTED]</b>	<b>[REDACTED]</b>	<b>[REDACTED]</b>	<b>[REDACTED]</b>	<b>[REDACTED]</b>	<b>[REDACTED]</b>	<b>[REDACTED]</b>
<b>Eligibility Rules</b>	1,574	3,900+	2,100+	400+	12,000+	2,725
<b>Stored Procedures</b>	80	25	15	52	765	350
<b>Screens</b>	1,134	500+	2,035	700	490	1,000+
<b>Enterprise Components</b>	8	8	8	12	10	8
<b>Reports Generated</b>	116	105	550	550	1,300	380

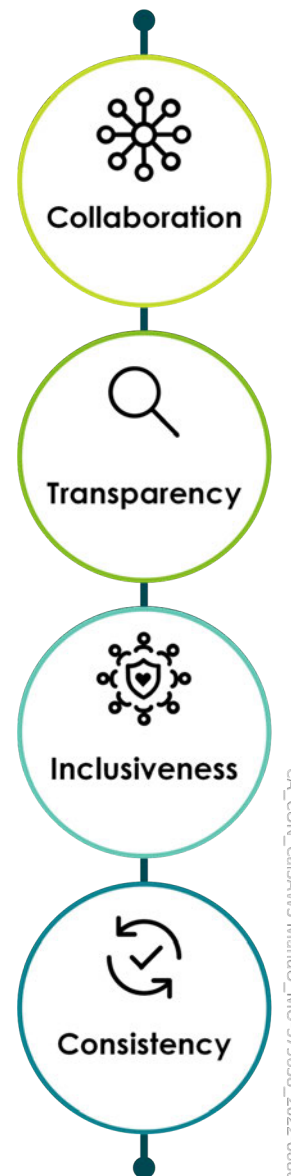
**Table 2A-2. Example of Deloitte's Large Complex IT System Experience.**

## **Multi-Stakeholder Experience**

Deloitte has collaborated with numerous State and federal agencies across the country to successfully deliver projects with similar services and equivalent size, scope, and technical components. Our experience includes working with multiple agencies, contractors, and data exchange teammates throughout the M&E of systems.

Our work with multiple stakeholders, including contractors, is based on the following key principles in Figure 2A-9 and described below:

- **Collaboration:** Deloitte reviews the change requested for M&E to identify the impacted stakeholders. An integrated work plan is created describing the responsibilities and dependencies of stakeholders. Deloitte also uses an Interagency Coordinator who acts as a liaison between CalSAWS vendor teammates and Consortium staff for effective communication and delivery.
- **Transparency:** Deloitte maintains a status dashboard highlighting the actual status of the project for every stakeholder. The dashboard is shared across the CalSAWS vendor teammates and Consortium staff. A status update meeting is conducted per the agreed-upon CalSAWS contract. A representative from each stakeholder attends and provides an update on the development and testing status.
- **Inclusiveness:** Deloitte conducts cross-vendor ceremonies including sprint planning, feature demos, scrum of scrum meetings, and retrospectives. A variety of cross-team architecture meetings furthers a collective understanding of the business requirements and end-to-end design across technology stacks owned by each vendor.
- **Consistency:** We consistently work with Consortium staff and other CalSAWS vendor teammates to work as one team, aligned on common goals and working toward successful outcomes in a badge-less environment while staying consistent with individual contractual obligations.



**Figure 2A-9.  
Deloitte's Principles  
for Multi-Stakeholder  
Engagement.**

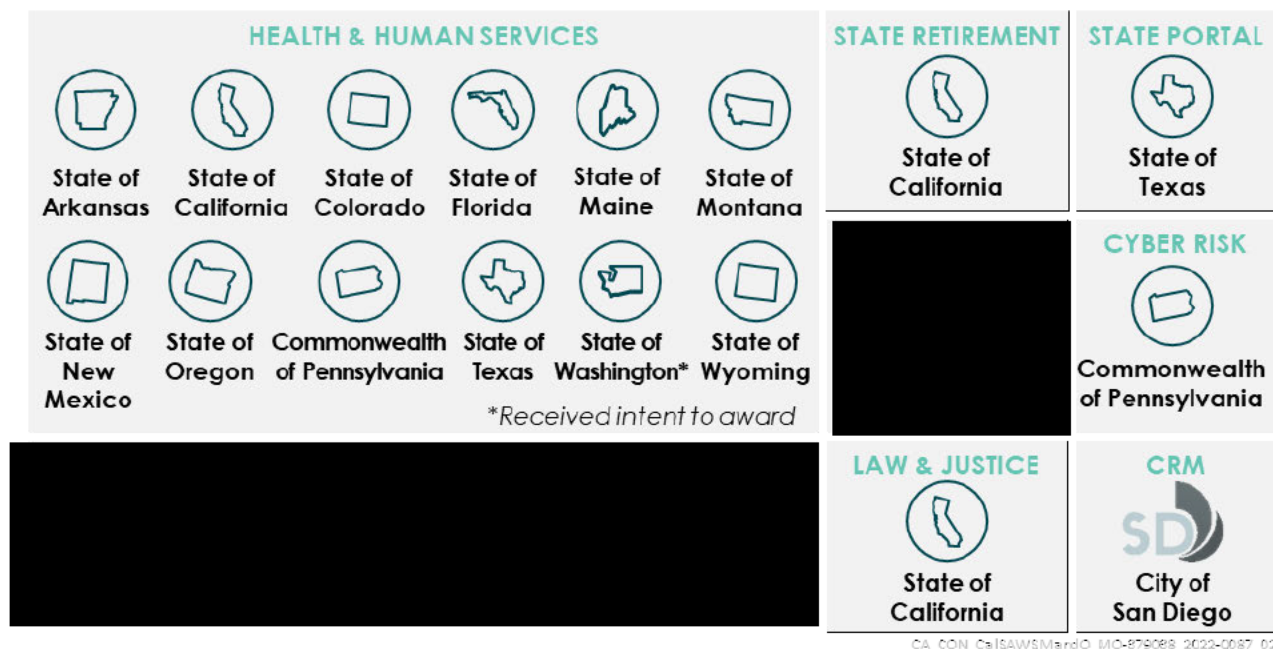
## 2A.1.2.4 System Transition (ME-F4)

**Our value is in our experience transitioning-in M&E support services for systems of similar scale and complexity. With our Enterprise Value Delivery approach, we maximize efficiency so you can focus on what matters most.**

We have successfully transitioned services for complex systems in an incremental and effective manner in our experience providing M&E Support. During these transitions in delivering transparently and collaboratively to effectively execute changes of this scale. Our transition experience includes the recent transition of CalHEERS solution M&E to our team.

### Proven Transition-in Track Record and Success

We understand transitioning between vendors is always a key worry. With Deloitte, it does not need to be. We have the people and methodologies to deliver a low-risk CalSAWS transition. Each time we have taken over a large government system like CalSAWS, we have maintained operational continuity and quickly improved operations. Deloitte has **transitioned into the role of M&E vendor for 20 large, complex enterprise-level federal, State, and local government and commercial systems**—most recently taking over E&E systems like CalSAWS in Arkansas, Maine, and Wyoming. Together, we energize new client teams by stabilizing their systems, helping them achieve quick wins, and working toward a more proactive approach to management of their environments. Figure 2A-10, below, depicts our Transition-In experience across sectors.



**Figure 2A-10. Deloitte's Relevant Transition Experience.**

We utilize our proven **Enterprise Value Delivery (EVD) for Transition and Operations** to plan and execute our transition of systems with our clients. We swiftly and successfully



transition systems while minimizing the transition period and allowing our clients to focus on larger operational items.

## 2A.1.3 Mandatory M&E Firm Qualifications

### RFP Reference: 5.3.1 M&E Firm Qualifications

The Consortium seeks a responsible M&E Contractor with the right experience to support the CalSAWS application over the life of the Agreement. Therefore, it is imperative that the Bidder provide enough detail in their response for the Consortium to evaluate the ability of the Bidder to meet or exceed the requirements herein, and perform the Services described within the M&E SOW in a professional, high-quality manner.

All Firm Qualifications contained in Sections 5.3.1.1, 5.3.1.2 and 5.3.1.3 must be met and documented according to Section 6 - Proposal Structure and Submission. Firm Qualifications requirements will be scored as pass or fail.

The completed M&E Firm Qualifications, in the required format, has been provided separately as "Attachment B8 – M&E Firm Qualifications" within Section 6 – Business Proposal Attachments. In the section below, we have provided a summary of projects that best reflect our substantive experience to support the scope of services for the CalSAWS M&E services contract. For each project reference, we describe the features and key accomplishments of the project as they correspond to the Firm Qualifications requirements in the following, Figure 2A-11. All our experience meets CalSAWS' criteria for Large and Complex IT Systems, as detailed in Table 2A-3 below.

Requirement	The Right Experience
ME-F1	 State of Texas Health and Human Services Commission (HHSC) - TIERS
	 State of Colorado, Governor's Office of Information Technology - Colorado Benefits Management System (CBMS)
ME-F2	 State of Texas Health and Human Services Commission (HHSC) - TIERS
	 Michigan Department of Technology, Management, and Budget (DTMB) - Bridges M&O Project
ME-F3	 Tennessee TennCare - Tennessee Eligibility Determination System (TEDS)
	 Commonwealth of Pennsylvania - Client Information System (CIS)
ME-F4	 State of California, Office of Systems Integration (OSI) – CalHEERS
	 Arkansas - Arkansas DHS Information Support Services (ISS)

**Figure 2A-11. Deloitte Exceeds CalSAWS M&E Experience Requirements.**

Large Complex IT System	≥ 2 Applications, including ≥ 1 COTS	≥ 5 External Systems, including ≥ 1 Real-Time	≥ 1k Users at Multiple Locations	≥ \$10M in Contract Value	Multi-Tiered Processing Solution
<b>Texas TIERS</b>	9 Applications, 9 COTS	34 External Systems, 3 Real Time	10k Users, 889 Locations	Yes	Yes
<b>Colorado CBMS</b>	300+ Applications, 48 COTS	38 External Systems, 16 Real Time	5k Users, 70+ Locations	Yes	Yes
<b>Michigan Bridges</b>	5 Applications, 3 COTS	20+ External Systems, 5 Real Time	10k Users, 126 Locations	Yes	Yes
<b>Tennessee TennCare (TEDS)</b>	6 Production Applications, 75+ COTS	11 External Systems, 45+ Real Time services	563,500 users, Multiple Locations	Yes	Yes
<b>Pennsylvania CIS</b>	6 Applications, 5 COTS	32+ External Systems, 14+ Real Time	8k Users, 100 locations	Yes	Yes
<b>State of California, OSI (CalHEERS)</b>	10 Applications, 2 COTS	41 External Systems, 30 Real Time	7.7M Users, Multiple Locations	Yes	Yes
<b>Arkansas ISS</b>	137 Applications, 5 COTS	26 External Systems, 26 Real-time	6k+ Users, 90+ County Offices	Yes	Yes

**Table 2A-3. Select Deloitte M&E Experiences.**

## 2A.1.3.1 Experience Performing Application Maintenance and System Modifications (ME-F1)

### RFP Reference: 5.3.1.1 M&E Firm Mandatory Qualifications

ME-F1 At least three (3) years of Prime Contractor experience performing application maintenance and system modifications on two (2) Projects involving large and complex IT Systems, with one (1) of the Projects having been on an Eligibility/Case Management system or Health Care system. Each of the two (2) Projects must have been completed or ongoing within the last five (5) years.

### Project 1: State of Texas HHS Commission – TIERS

Deloitte has worked with Texas over the past **17 years** to design and build the **large complex TIERS eligibility system** and **maintain and enhance** it into an ecosystem of integrated applications, including YourTexasBenefits.com (self-service portal), YourTexasBenefits Mobile (mobile application), and Long-Term Services and Support (LTSS). The Deloitte Design, Development, and Implementation (DDI) team is responsible for making system enhancements to the TIERS suite of applications to maintain compliance with State and federal regulations, audit findings, and other priorities from business, such as reducing workload impacts, cost savings, and fraud prevention.



**TIERS is a fully integrated IT system** comprised of over 9 different applications in which development occurs simultaneously across 25 scrum teams. Deloitte has expertise in managing this complex system that has over 50 interconnected systems.

## **Project 2: State of Colorado, Governor's Office of Information Technology – CBMS**

Deloitte **designs, develops, and implements enhancements** for the **large complex CBMS**, which is a mission-critical, statewide **integrated eligibility** system used to assess and issue government benefits to Coloradoans based on their eligibility. Deloitte also provides **M&E services** for CBMS, including production operations and support, environment management, configuration management, database and server administration, system performance monitoring, system backups, and security compliance. In addition to DDI and M&E services, Deloitte provides project management services, organizational change management services, analytics and data insights services, human-centered design strategic services, and cost allocation advisory services.

Since **Deloitte's work with CBMS began in 2008**, Deloitte has implemented over 1 million hours' worth of system enhancements to deliver continuous improvements to the CBMS system. In 2020 alone, the team delivered over 200,000 hours of enhancements. Many of these improvement efforts have become enterprise standards for Colorado.

### **2A.1.3.2 Experience Performing Operational Activities (ME-F2)**

#### **RFP Reference: 5.3.1.1 M&E Firm Mandatory Qualifications**

ME-F2 At least three (3) years of Prime Contractor experience performing operational activities including system engineering, capacity planning, performance testing, performance monitoring, and batch processing on two (2) Projects involving large and complex IT Systems with one (1) of the Projects having been on an Eligibility/Case Management or Health Care system. Each of the two (2) Projects must have occurred within the last five (5) years.

## **Project 1: State of Texas Health and Human Services Commission (HHSC) – Texas Integrated Eligibility Redesign System (TIERS)**

Deloitte has worked with Texas HHSC over the past **17 years** to design, build, and **operate** the TIERS, **a large and complex IT system supporting eligibility and case management** of programs like CalSAWS. As part of TIERS, Deloitte maintains and enhances an ecosystem of integrated applications, including YourTexasBenefits.com, YourTexasBenefits Mobile,) and LTSS. The Deloitte TSS team is responsible for performing **system engineering** activities, software compatibility **testing** for innovative technology upgrades, **capacity planning** for the TIERS suite of applications, **performance testing and monitoring**, and **batch processing** to meet TIERS' intricate needs and requirements.

TIERS is comprised of over 9 different applications where development occurs concurrently across 25 scrum teams. Deloitte has expertise in managing TIERS that has over 50 interconnected systems. Deloitte's capacity modeling has enabled us to support special programs introduced to aid the Texas citizens during the pandemic, such as Pandemic Electronic Benefits (PEBT).

## **Project 2: Michigan Department of Technology, Management, and Budget (DTMB) – Bridges M&O Project**

Deloitte provides Michigan with technical configuration management support, incident management, enhancements, and 24x7x365 system management and support for Bridges, the State's **E&E system**, that Deloitte and Michigan implemented in **2007**. Deloitte delivers **system engineering, capacity planning, performance testing and monitoring, and batch processing** for Bridges, the Enterprise Service Bus (Michigan HUB), and the Integrated Service Delivery Portal, a self-service portal for clients. Bridges is a **large and complex IT system** supporting eligibility/case management of programs like CalSAWS.

Bridges supports 10,000 users located in 126 field offices to determine eligibility and benefit amounts for 55 types of federal and State assistance, and it serves 2.5 million clients in over 1.5 million cases across 83 counties in Michigan. Bridges supports intake, eligibility, and administration of core social services programs, including Food Assistance (SNAP), Cash Assistance, Child Development Care (CDC), State Emergency Assistance, Medicaid, and CHIP. As a part of Deloitte's work, the team supported a fully integrated client-facing portal, MI Bridges, for new applications, existing case changes, and redeterminations securely over the web. The system also supports a fully functioning Interactive Voice Response (IVR) system for clients to check on their benefits over the phone

## 2A.1.3.3 Experience with Large and Complex IT System Projects (ME-F3)

### RFP Reference: 5.3.1.1 M&E Firm Mandatory Qualifications

ME-F3 Prime Contractor experience with at least one (1) large and complex IT System Project involving at least three Contractors responsible for different areas of the system. The Project(s) must have been completed or ongoing within the last ten (10) years.

### Project 1: Tennessee TennCare – Tennessee Eligibility Determination System (TEDS)

Deloitte was the primary system integrator to build the new **large and complex Tennessee Medicaid Eligibility System (TEDS) solution** tailored to Tennessee Medicaid policy. TEDS automates Medicaid Eligibility determination for all TN Medical Assistance programs through a streamlined, all-in-one benefits eligibility web portal. TennCare is a **multi-stakeholder support environment**, and we have worked in collaboration with all the vendors by playing the SPMO and Systems Integrator role and by defining and mutually agreeing on trading vendor agreements with these vendors. TennCare is supported by Deloitte, KPMG (Architecture and contract advisory services), Gainwell (Legacy MMIS systems management and operations), NTT Data (Contract IV&V and Testing services), AHS (Member services operations Support), Maximus (contact center Services), AI (MDM operations management), and several other strategic vendors in multiple areas. We have led and defined guidelines in enabling these entities work together to support the mission of TennCare.

Over the past three years, Deloitte has achieved many notable outcomes across the TEDS/TennCare project, including successfully implementing the TEDS system in May 2019 and continuing to provide M&O services post-go live. Through this, Deloitte successfully worked with multiple stakeholders, each supporting distinct aspects of the production system.

### Project 2: Commonwealth of Pennsylvania – Client Information System (CIS)

Deloitte has actively teamed with Pennsylvania's DHS **since 1978**, providing services for their **large, complex CIS**, including application design, development, maintenance, change leadership, field support, training services, strategic planning, and business IT strategy. Deloitte collaborates across a multi-vendor and multi-system ecosystems to successfully deliver DHS programs and has demonstrated the ability to navigate the landscape of business teammates, vendors, and external stakeholders necessary for sustained project delivery and reduction of risk. Deloitte works with **vendors and business teammates** that are **responsible for multiple areas of the system** including Public Consulting Group (business planning), Conduent (Electronic Benefits Transfer issuance), Maximus Inc. (enrollment), Edifecs (Electronic Data Interchange), and Gainwell (Medicaid Management Information System). Deloitte provides the technical

viewpoints required for a 360-degree view of considerations across PA DHS systems, program offices, external agencies, teammates, and vendors.

Deloitte's efforts continue to reduce reliance on the legacy mainframe infrastructure and costs and improve modularity and scalability. Over time these initiatives have included critical updates for the CIS suite of systems because of the scalability of the solutions.

In addition to the two projects reflected above and detailed in Attachment A8 of our response, we have included two additional California project summaries below as additional examples of our experience in multi-vendor environments in California HHS.

### **California Department of Health Care Services – FDR**

Since July 2019, Deloitte has been working in a multi-vendor environment with the DHCS acting as the System Integration to build and deliver the Federal Draw and Reporting (FDR) product to the DHCS Accounting business user group. The multi-vendor environment included Deloitte as the Design and Engineering vendor, Oncore as the Support Services vendor, and Civic Actions as the Cloud Infrastructure and Pipeline vendor. All three teams each had team members embedded within the different project teams and worked together to deliver the FDR product. For example, Deloitte staffed five engineering teams and each team was staffed with an OnCore Scrum Master who led the team through the different agile events. And Deloitte staffed a Product Team that was comprised of State Product Managers and Product Owners, Oncore Business Analysts, Deloitte Business Analysts, Deloitte UX Designers, and Deloitte Visual Designers. All worked together to discover new epics and build detailed user stories. Examples of how we have worked together:

- Deloitte staffed five engineering teams and each team was staffed with an OnCore Scrum Master who led the team through the different agile events.
- The Deloitte team worked directly with the Civic Action team to understand how the cloud platform and pipeline was built to then deploy the FDR application onto the platform. The teams met frequently for close to a year to help ensure all had the same understanding of how the platform and pipeline were built.
- Deloitte staffed a Product Team that was comprised of State Product Managers and Product Owners, Oncore Business Analysts, Deloitte Business Analysts, Deloitte UX Designers, and Deloitte Visual Designers. All worked together to discover new epics and build detailed user stories.

### **State of California, Office of Systems Integration (OSI) – CWS-CARES**

The Child Welfare Services-California Automated Response and Engagement System (CWS-CARES) is intended to replace California's legacy child welfare systems, including the Child Welfare Services/Case Management System (CWS/CMS). Deloitte has been engaged by OSI to build and deliver CWS-CARES, using an iterative methodology and

user-centered design approach. In addition to the build out of CWS-CARES, the State intends to maintain its own copy of all data contained within the State's own CARES Data Infrastructure (CDI). CWS-CARES is being delivered in a multi-vendor environment. The vendors include:

- Product Value Services (PVS) vendor: PVS provides strategic advisory services to the State, with emphasis on alignment across policy, practice, and product and adherence to CWS-CARES Product Development Guiding Principles.
- CARES Data Infrastructure (CDI) vendor: The CDI vendor is responsible for building out the infrastructure for CARES on AWS (including the data pipeline that replicates the Salesforce Data into AWS). The CDI vendor builds the requisite data services and data exchange APIs between Salesforce and the data pipeline.
- Platform as a Service System Integrator (PaaS SI) vendor: Deloitte, as the PaaS SI vendor is the primary systems integrator and deliver a complete CCWIS, including both Salesforce and CDI components, that works together architecturally, technically and functionally. This includes the build out (including testing) of Salesforce platform, enterprise architecture, data conversion, security, interfaces, business rules and document management. Deloitte is also responsible for overall project management activities and coordination across all the entities (vendor and State) that support CWS-CARES
- Implementation Services vendor: Deloitte, as the implementation services vendor, is responsible for implementation planning, rollout, training and change management activities for the CWS-CARES.
- Legacy CWS/CMS M&O vendor: The legacy M&O vendor is responsible for M&O activities for the legacy CWS/CMS. The vendor is also responsible for working with PaaS SI and CDI vendors to facilitate data conversion activities.
- Independent Advisor vendor: The Independent Advisor vendor independently assesses if the CWS-CARES project is on track to deliver CWS-CARES based on the project's goals and user needs, and to provide related guidance and recommendations to the Project Team, the Executive Leadership Team (ELT), and the Board of Directors (BOD).

The Deloitte team, as the PaaS SI vendor, works with all the vendors identified above throughout the CWS-CARES Service Delivery Lifecycle. We work as part of a multi-functional team consisting of State, county and other vendor resources to collectively deliver the CWS-CARES. Some examples include:

- Our team supports the State and collaborates with the PVS vendor to iteratively develop business requirements and conduct ongoing, collaborative Context-setting sessions with program partners. This activity includes the definition of a Value Hypothesis documenting program goals and metrics for each CARES Process Area. Our team works with the State and PVS team to develop and maintain CARES Design Patterns and Component Library in accordance with CARES Design Principles and Standards.



- Our team supports the State and the CDI vendor in building the data pipeline that will replicate Salesforce data into AWS. Our team works with CDI to define the data replication and conversion activities (including the data model). We work with the CDI team to help setup the toolset required to support key activities like conversion (Talend), interfaces (MuleSoft), content management (Adobe Experience Manager AEM), Security (OKTA) and business rules (Red Hat Decision Manager). Our team works with the CDI vendor to establish the CARES Object Model, and with reference to the CARES Domain Model to achieve the State's analytics and data management goals

As the overall SI for CWS-CARES, our team collaboratively worked with all vendor and state entities to build the enterprise project schedule for CWS-CARES delivery. Our team worked with all the parties to define tasks, durations and dependencies for the enterprise project schedule.

### 2A.1.3.4 Experience Transitioning a Large and Complex IT System (ME-F4)

#### RFP Reference: 5.3.1.1 M&E Firm Mandatory Qualifications

ME-F4 Prime Contractor experience with the transition of one (1) large and complex IT System Eligibility/Case Management or Health Care system, from one company to another. The Project must have occurred within the last ten (10) years.

#### Project 1: State of California, Office of Systems Integration – CalHEERS

Deloitte has been serving as the M&O integrator for California's **large complex eligibility system, CalHEERS**, since **September 2019**. Deloitte provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications. Deloitte is tasked with the implementation of accelerated modernization programs, including the migration and optimization to an AWS Cloud environment, delivery model transformation (Agile/DevOps), and workforce transformation.

Deloitte successfully **transitioned the system** from the incumbent vendor, the same vendor as the CalSAWS incumbent vendor, during the COVID-19 pandemic in 9 months (3 months ahead of schedule) with 100% availability and minimal disruption to stakeholders, plan members, and consumers. The team also implemented multiple system enhancements while simultaneously maintaining current operations, such as enabling and expanding the Special Enrollment Period for COVID-19-impacted individuals to apply for subsidized health coverage, allowing more than 340K consumers to apply for health coverage since May 2020.

#### Project 2: Arkansas – Arkansas DHS ISS

The Arkansas DHS selected Deloitte as the M&O vendor for their **large and complex application portfolio**. Deloitte **transitioned-in** to replace the incumbent vendor, who managed the DHS portfolio for **more than 20 years**. Deloitte's full services include M&E

of the DHS application portfolio, including over 130 applications, thousands of hours of enhancements to the suite of legacy applications per year, incremental modernization to several legacy systems including enterprise licensing, behavioral health case management for substance abuse, and employee travel reimbursement applications. Deloitte also provides full-scale management of all analytics capabilities including management of the existing data warehouse, and implementations of numerous operational dashboards including ad-hoc reporting for all divisions, as-needed services to manage end-user desktops. Deloitte also manages security and cyber-related activities such as audit support and vulnerability scanning with manual penetration testing.

## 2A.1.4 M&E Firm References

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### RFP Reference: 5.3.1.2 M&E Firm References

The purpose of the Firm Reference requirements is to provide the Consortium with the ability to assess the Bidder's experience in supplying similar or relevant services to those identified in this solicitation. Firm References must be met and documented according to Section 6 - Proposal Structure and Submission. The Consortium may contact references listed to verify the information provided by the Bidder. Proposals with forms that have alterations or changes to the original information will be considered nonresponsive. Any conflicting information may result in the Proposal being deemed nonresponsive.

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The completed and signed M&E Firm References, in the required format, has been provided separately as "Attachment B9 – M&E Firm References Forms" within Section 6 – Business Proposal Attachments.

# Staffing Approach

## Section 3

RFP Reference: 6.3.8.5 Section 3 – Staffing Approach  
RFP Reference: 6.3.8.5.1 Staffing Approach Narrative

**Our proposed key staff bring over 240 years of experience across their specialized domains to deliver CalSAWS M&E services. This qualifies them to better anticipate and manage risk as the CalSAWS' M&E evolves to utilize new technologies and meet Counties' business needs. This is particularly important as CalSAWS is transformed to a microservice-based architecture by the M&E contractor. Supported by our national eligibility and enrollment (E&E) network, technology alliances, and broad capabilities of Deloitte, our team is able to take away the gray, so the Consortium is better able to serve the needs of Counties and their customers.**

**The End Result: Californians in need (our ultimate customers) are able to be served faster and better by County agencies using CalSAWS.**

### How this Section is Organized

#### 3.1 Staffing Approach Narrative

- 3.1.1 M&E Staffing Approach (ME-S1)
- 3.1.2 M&E Key Staff
- 3.1.3 Additional Project Leadership and Advisors

#### 3.2 Staffing Experience Details

- 3.2.1 Staff Resumes and Qualifications
- 3.2.2 M&E Key Staff Client References

Helping the  
Consortium

color  
outside  
the lines



### SECTION HIGHLIGHTS

- Our proposed staff bring over 240 years of experience with E&E systems like CalSAWS. We also have delivery experience across 21 states, including large states like Texas and Florida.
- We bring experienced leadership with enterprise technical solutions such as AWS, service desk, ServiceNow, ITIL, and system transitions in 21 states.
- Our team brings direct experience working with California and County agencies for over 22 years.
- We have extensive experience with California SAWS systems, including CalSAWS, C-IV, CalWIN, C-IV Migration, and LRS.



## 3.1 Staffing Approach Narrative

### RFP Reference: 6.3.8.5.1 Staffing Approach Narrative

The Bidder shall provide a narrative describing the overall Staffing approach to the M&E Services team including responding to Staffing Approach and Requirements contained in Section 5 – Requirements. The Bidder shall describe the criteria used to fill the M&E Services Key Staff positions and should discuss the planned interaction between these individuals and Consortium's Project Staff in similar roles. The Bidder must include an organization chart displaying the relationships of the M&E Services team and include the relationships of the M&E Services team to the CalSAWS Migration Project, Consortium and other Consortium Contractors.

We have organized our response to address both RFP Section **6.3.8.5 – Section 3 Staffing Approach**, and **Section 5.3.2.1 – M&E Staffing Approach** requirements. Table 3-1 below provides a mapping of our response to **Section 6.3.8.5.1** requirements.

Section 6.3.8.5.1 Requirement	Section Where Response Is Located
The Bidder shall provide a narrative describing the overall Staffing approach to the M&E Services team including responding to Staffing Approach and Requirements contained in Section 5 – Requirements.	<b>3.1.1 – M&amp;E Staffing Approach (ME-S1)</b> (Page 3-2 to 3-24) <b>3.1.1.5 – Staffing Worksheets (ME-S2)</b> (Page 3-25)
The Bidder shall describe the criteria used to fill the M&E Services Key Staff positions and should discuss the planned interaction between these individuals and Consortium's Project Staff in similar roles.	<b>Criteria Used to Select Key Staff</b> (Page 3-10 to 3-12)
The Bidder must include an organization chart displaying the relationships of the M&E Services team and include the relationships of the M&E Services team to the CalSAWS Migration Project, Consortium, and other Consortium Contractors.	<b>Deloitte's M&amp;E Organization Chart</b> (Page 3-8 to 3-9)

**Table 3-1. Compliance Matrix for Section 6.3.8.5.1 Requirements.**

### 3.1.1 M&E Staffing Approach (ME-S1)

#### RFP Reference: 5.3.2.1 Infrastructure Staffing Approach

#### Attachment B10 Requirements: ME-S1

**ME-S1:** The Bidder will provide a narrative describing the overall Staffing approach to the M&E Services addressing the following Staffing subsections.

- Subsection 5.3.2.1.1 General Contractor Staffing Responsibilities
- Subsection 5.3.2.1.2 Staff Responsibilities
- Subsection 5.3.2.1.3 Contractor Staff Changes
- Subsection 5.3.2.1.4 Staff Performance



### 3.1.1.1 General Contractor Staffing Responsibilities

#### RFP Reference: 5.3.2.1.1 General Contractor Staffing Responsibilities

The Contractor is responsible for providing all Staff necessary to fulfill the Services and requirements defined in this RFP. Any increase to the Agreement price for additional staff will only be allowed pursuant to the Consortium Change Order process.

The Contractor is responsible for employing an approach for Staff management that facilitates a productive working relationship with Consortium Staff, County Staff, other Consortium contractor Staff, and State Staff/Project Sponsors. The Contractor's Staff will proactively coordinate and work collaboratively with the Consortium.

The Bidder must include an organization chart displaying the relationships of the M&E Services team and include the relationships of the M&E Services team to the Consortium and other Consortium Contractors.

### Providing Staff Necessary to Fulfill the Contract

With more than 415,000 professionals worldwide and the largest eligibility & enrollment (E&E) practice in the United States, we meet our responsibilities of Consortium's CalSAWS M&E contract with the right resources, in the right locations, at an optimal price point. We primarily service this contract with professionals from our Government and Public Sector (GPS) practice. Highlighted in Figure 3-1, our GPS practice of over 25,500 US-based professional provides a wide array of specialized services to 49 states and Federal Government.

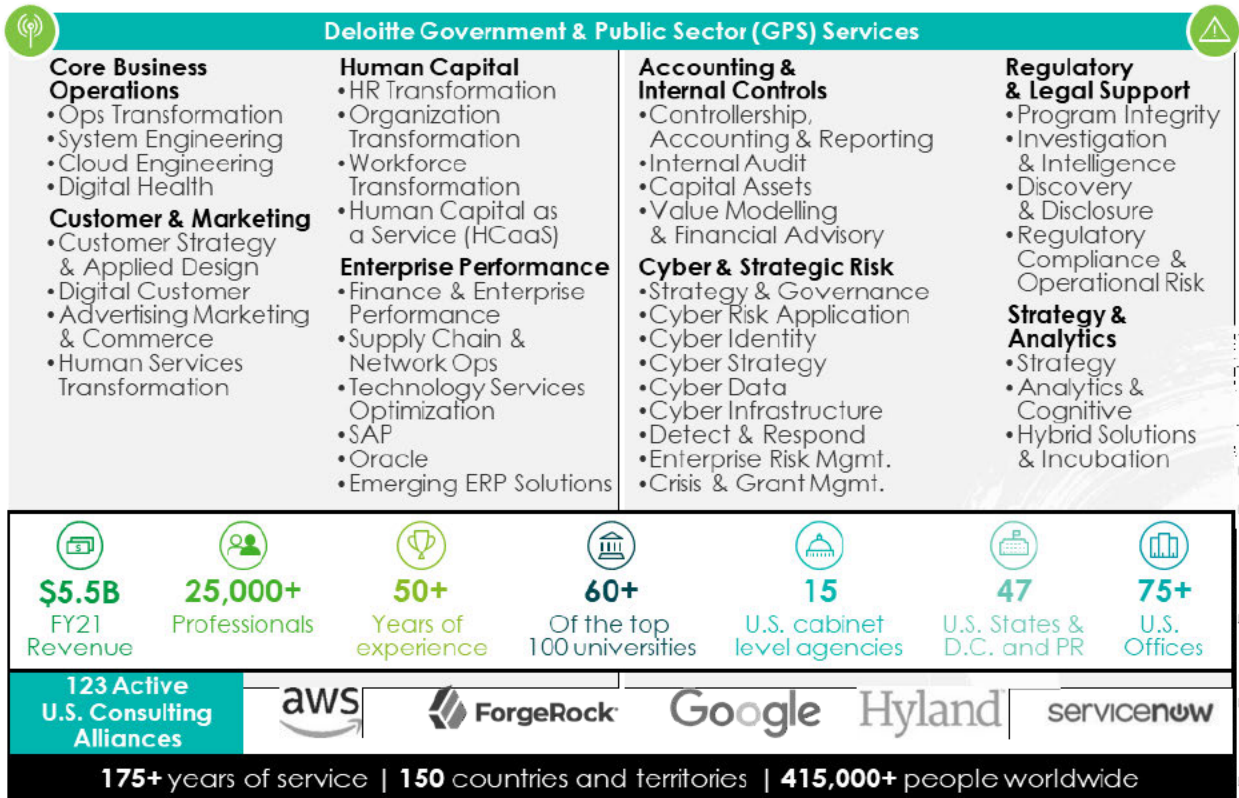
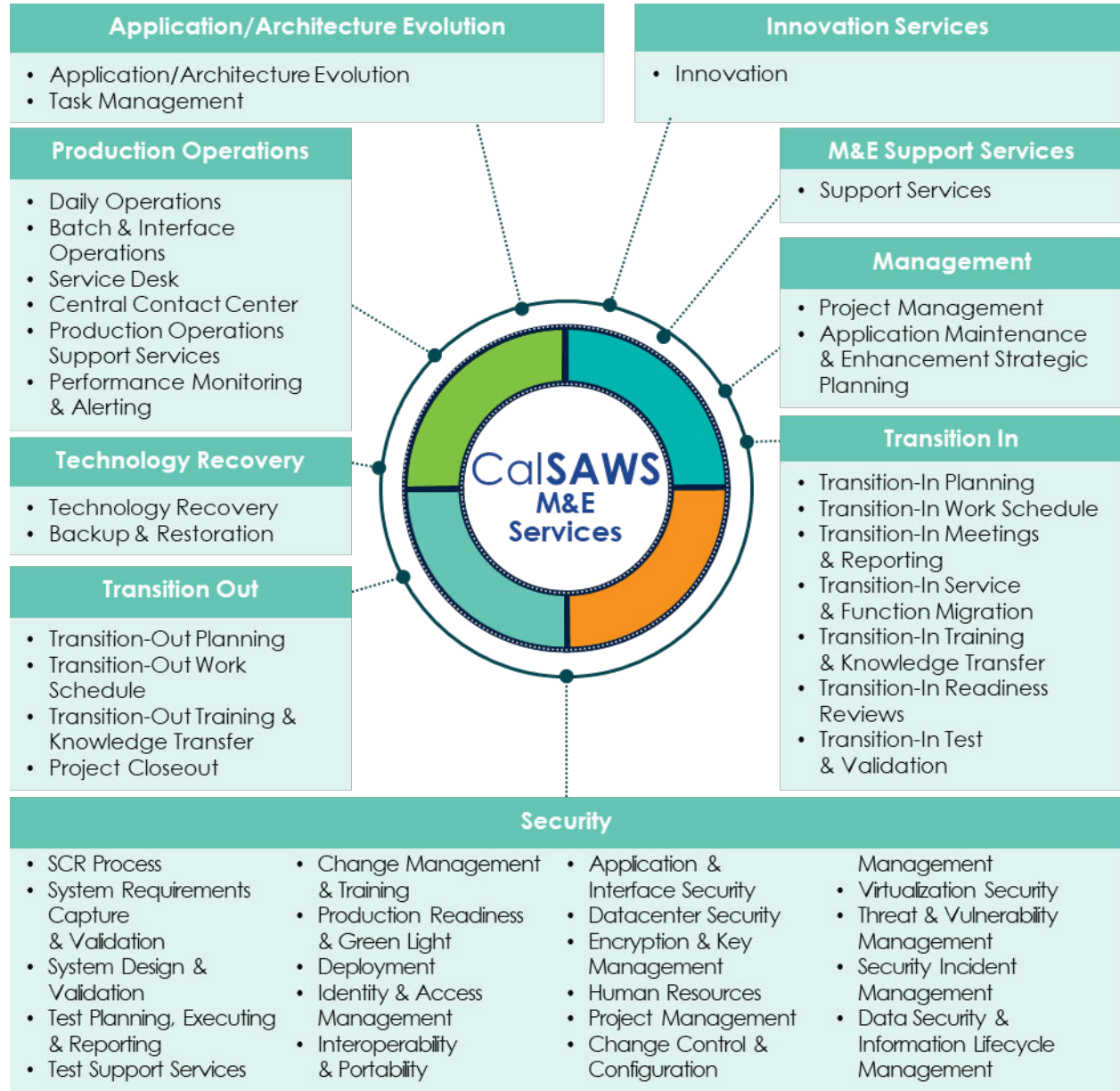


Figure 3-1. Deloitte GPS Capabilities Enable to Provide for the CalSAWS Project.



The full complement of our staffing to meet the M&E Statement of Work (SOW) requirements / services of the RFP, depicted in Figure 3-2 below, and our associated proposal, is reflected in Section 3.1.1.5 – *Staffing Worksheets*.



CA\_CON\_CalSAWS\_MendO\_MO-379036\_2022-0212\_M&E

**Figure 3-2. CalSAWS M&E Services Tasks and Subtasks.**

Given the mission critical nature of the services delivered as part of the M&E Services SOW, we have opted to not subcontract portions of the contract to another vendor, but rather augment our team with resources through our Contingent Workforce Services (CWS) function. CWS allows our Project Manager, Rakesh Duttagupta, the flexibility to quickly onboard additional resources as needs arise through the change order process.

## **Large Subcontractor Network for Specialized Capabilities**

Our subcontracting approach is based on a “best and brightest” concept. Nationally we work with over 1,500 different companies. This reach allows us to efficiently find and deploy the right resource for the right situation. Deloitte carefully selects subcontractors based on their ability to deliver high-quality service and high-quality people. To be considered for subcontracting with Deloitte, firms must have a credible corporate background with a proven record of outstanding client services, a common goal to deliver client satisfaction, and high-quality experienced resources appropriate to their respective project roles.

For CalSAWS, like we have for CalWIN ISS and BenefitsCal, we will follow our normal practice where we integrate our subcontractor resources directly into our teams. Often, we place them in positions within the project organization that are suited to their specific skills. One of the most notable compliments that we take away from many of our project efforts is that it is exceedingly difficult to distinguish between Deloitte staff and our subcontractor staff – as they are well integrated into the project teams. We follow this integration approach with our clients as well.

## **Agreement Price for Additional Staff**

Deloitte acknowledges and agrees that increases to the Agreement price for additional staff is allowed only pursuant to the Consortium Change Order process. Our approach mitigates additional increases to the agreement price while also making space for changes if the demand of the project calls for them. If additional staff are required Deloitte follows the Consortium Change Order process.

## **Facilitating Productive Working Relationships**

Productive working relationships require trust. The Deloitte leadership team uses a set of guiding principles, listed in Table 3-2 that we follow from the beginning of the project to help ground the team in their assigned roles and responsibilities, build trust, and, ultimately, strong working relationships. These principles are founded in mutual respect, integrity, and a spirit of building a One Team mentality. Building trust is the way forward for elevating the human experience as explored by Deloitte leader, Amelia Dunlop, in the Four Factors of Trust: How Organizations Can Earn Lifelong Loyalty. The pillars of transparency, being human, credibility, and being reliable are all fundamental to our Deloitte culture. We promote individual collaboration with Consortium staff, CalSAWS contractors, interfacing partners, State Staff/Sponsors, Counties and other stakeholders. This promotes productive working environment across our blended project team.

Principle	Actions We Take Based on This Principle:
<b>Establish Common Purpose and Norms</b>	<ul style="list-style-type: none"> <li>Assemble leaders across the Consortium, CalSAWS Counties, CalSAWS contractors, and the Deloitte leadership team to define team norms, values, and preferred methods of operation.</li> <li>Review key dates, deliverables, cross-team dependencies, and potential roadblocks to success.</li> <li>Identify preferred cadence and methods of communication and collaboration.</li> </ul>
<b>Ethics and Fairness</b>	<ul style="list-style-type: none"> <li>Use data, technology, and systems in an ethical, fair, and trusted manner.</li> <li>Define methods to identify, track, and monitor risks, issues, and impediments.</li> </ul>
<b>Growth and Passion</b>	<ul style="list-style-type: none"> <li>Encourage staff to grow, learn from others, and co-create.</li> <li>Channel the mission-driven passion each team member possesses to help drive forward project goals and objectives.</li> <li>Mentor counterparts on the context around decisions and directives.</li> <li>Celebrate everyone's diversity in thought, experiences, and perspectives; encourage them to challenge the status quo, while still managing risk.</li> </ul>
<b>Collaboration and Personal Relationships</b>	<ul style="list-style-type: none"> <li>Identify methods to celebrate successes across the entire team.</li> <li>Celebrate individuals going above and beyond their assigned tasks and responsibilities.</li> <li>Create opportunities for formal and informal collaboration, celebration, and cross-team collaboration.</li> <li>Shared vision and goal that we are all working toward the same North Star.</li> <li>Create a culture of "one team" instead of State versus contractor.</li> </ul>
<b>Transparency and Openness</b>	<ul style="list-style-type: none"> <li>Be transparent in decisions.</li> <li>Give credit where credit is due, regardless of team or title.</li> <li>Share information openly, discuss challenges and mistakes.</li> <li>Lead and manage the growth mindset across all levels of the team.</li> </ul>

**Table 3-2. Engagement Guiding Principles.**

Our integrated team structure, detailed in later in this subsection under **Deloitte's M&E Organizational Chart**, also encourages collaboration, communication, and shared responsibilities across the team.

## **Proactive Coordination and Cooperation with Consortium**

Our staffing is based on a mirrored organization model. The intent is to assign distinct responsibilities, encourage smooth interactions, and focus attention on project activities between our leadership and staff and yours. Alignment between the Deloitte staff, the Consortium and CalSAWS contractors provides clear communication channels between staff members assigned ownership over similar parts of the Project. For example, our Project Manager, Rakesh Duttgupta, acts as the primary Deloitte counterpart to the Consortium leadership team for planning, development, and execution of M&E services. Proactively aligning team members facilitates faster issue

resolution, helps keep the project on schedule, and supports joint ownership of issues and milestones.

At BenefitsCal, our team established weekly integrated environments management meeting across vendors and Consortium to discuss M&E changes/upgrades and impact to connected environments. Deloitte's CalWIN ISS team initiated a review of all validation efforts tied to the migration that resulted in Deloitte introducing process simulation activities. These were originally not scoped nor planned but due to a gap in validation activities the Deloitte team introduced this exercise. Additionally, the CalWIN ISS team spearheaded the effort to aid the CalWIN counties in defining their configurations for task management and document routing efforts in advance of County Prep activities to facilitate a smoother migration to CalSAWS. This was also an unplanned effort but one that the CalWIN ISS Team identified as critical to mitigation potential service disruption. When BenefitsCal identified potential anomalies in system usage it immediately engaged the Consortium to review usage patterns and aid the incumbent vendor with performing diagnostics. This is the type of engagement you should expect from your vendors.

Open and clearly defined lines of communication are critical to cross-team collaboration. Every level of the Consortium and CalSAWS Counties need timely and accurate information about the project. These are the expectations we hold for all projects that we manage. Figure 3-3 later in this subsection under **Deloitte's M&E Organizational Chart**, shows how we propose Consortium staff with their respective Deloitte counterparts.

### **Effectively Using Hybrid Work Environments**

To keep the Consortium, the Deloitte Team, and other contractors interconnected throughout ongoing operations, we have a defined set of tools to help keep us in alignment. As the project will follow a hybrid work environment, we use technology, Microsoft Teams, to keep our joint team in sync across system activities. While that is essential and helpful, the strongest relationships are built from in-person engagement, which we combine with our use of teleconferencing technology. We have our key staff on-site for at least 75% of their time during the transition period is complete and accepted. Specified non-key staff, as defined in the Transition-In Management Plan (TIMP), will be on-site for activities that require on-site engagement to facilitate the transition activities from the incumbent.

Mike Henry, our Transition Manager, used a similar approach in his experience working with the State of California. As the Engagement Transition Manager at CalHEERS, Mike used some of these tools to help deliver training and provide ongoing support to County staff in the CalHEERS system.

Furthermore, Deloitte is prepared to work in a multi-contractor environment. Each contractor has its own contract, deliverables, timelines, and defined methodologies. Working in this kind of environment is very familiar to Deloitte staff as demonstrated from past State of California projects, including BenefitsCal, CalWIN ISS, California's Medicaid Management Information System (CA-MMIS), Child Welfare Services – California

Automated Response and Engagement System (CWS-CARES), California Cybersecurity Strategy, and CalHEERS and numerous E&E projects around the country.

We are prepared to work in tandem with other contractors to enable a smooth transition. We have a clear understanding of what we are tasked with to operate and manage CalSAWS, and we are actively involved regardless of what badge we wear on the project. The role we play is more than just helping maintain the CalSAWS M&E; it is to help bring together the Consortium and other contractors to meet and exceed SLA requirements, continually optimize system performance, and effectively identify and mitigate risks. We sustain a collaborative environment to support a fully functional CalSAWS ecosystem.

### **Deloitte's M&E Organizational Chart**

All too often, those who write the proposal are not the ones tasked with project delivery. This leads to a disconnect between what is proposed and what is delivered, creating risks and issues for the project. But Deloitte does things differently. We make sure that each team member—introduced later in this section—is personally involved in developing our approach and crafting our response. This team brings together the best of M&E services, with deep knowledge in managing complex HHS IT projects along with a history of working together on prior successful M&E support engagements.

In our organizational chart, shown in Figure 3-3 a key icon (🔑) identifies key staff positions. Resumes for each key staff member can be found in **Attachment B10 – M&E Staff Resumes and Qualifications**. The chart includes additional non-key personnel who add significant value to the M&E Services contract. The organization is structured in around four core areas: project executive leadership and advisors, the Project Management Office (PMO), the Delivery Integration Office and key M&E-related work threads.



## M&E Org Chart

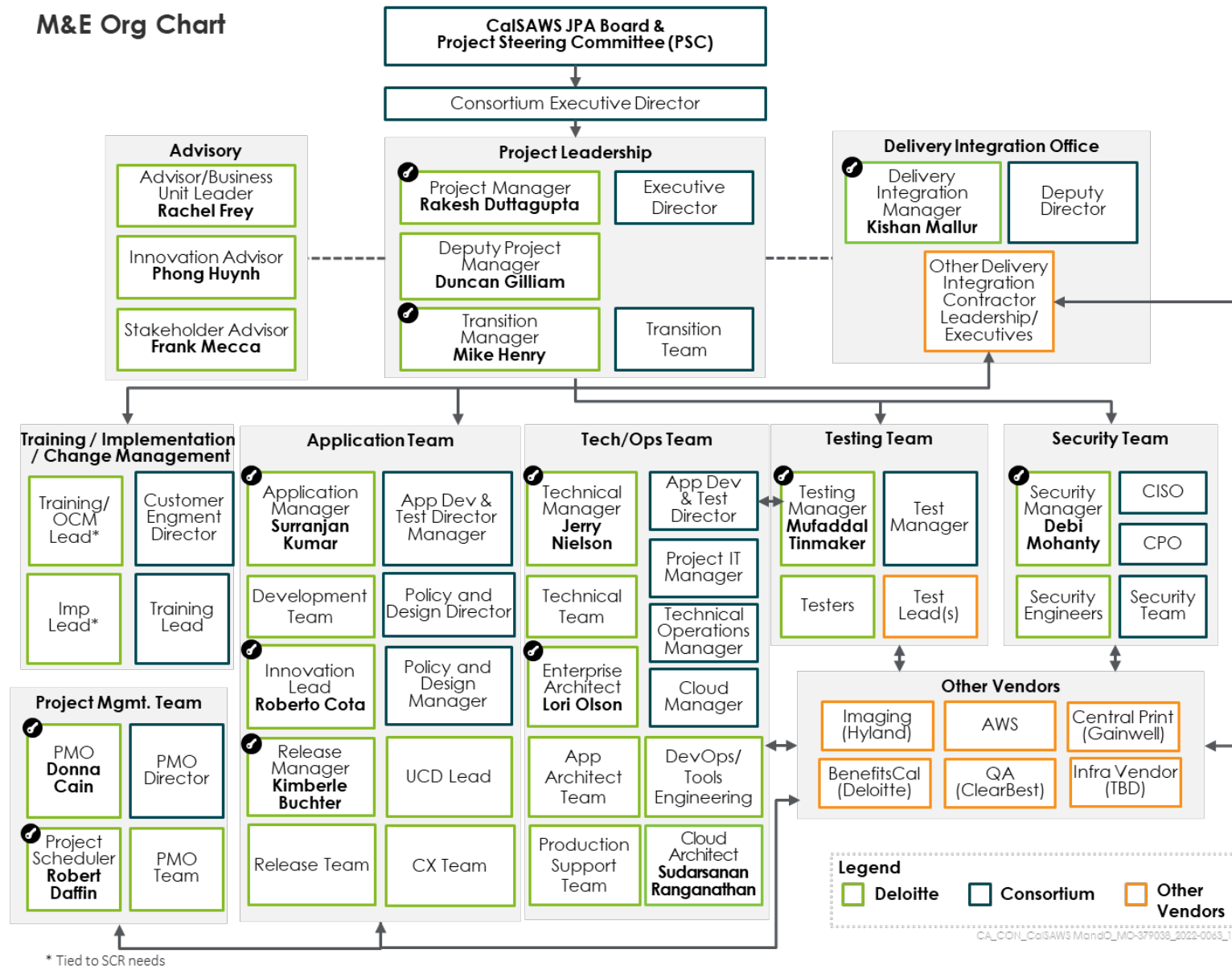


Figure 3-3. Deloitte's M&E Organizational Chart.

Communication is enhanced between different levels of each organization when each person knows who their counterpart is and understands the lines of communication. Our organization in Figure 3-3 and staffing management approach is based on a mirrored organizational model with Consortium staff, referred to as a two in the box, and other CalSAWS contractors. This mirroring helps the Deloitte facilitate smooth interactions and alignment with Consortium counterparts, maximizing collaboration. Our team also fully expects that they will be working directly with their CalSAWS contractor counterparts although the organization chart reflects going through the Delivery Integration Office. We anticipate following a similar approach to what we have exercised with BenefitsCal where contractor leads work directly with one another rather than having to always go through the Delivery Integration Managers and other Project Executives. This model empowers decision-making at the right levels, fosters accountability through reporting relationships and governance, and enables tight integration between CalSAWS Consortium, Deloitte, CalSAWS Counties, and other contractors. This enables our joint team to effectively mitigate risks, resolve issues, and maintain the project timelines.

### Criteria Used to Select Our Key Staff

We selected individuals who are driven by the mission to support the CalSAWS M&E Services contract as a unified team, clearing the path for a fully functional and secure CalSAWS system. Maintaining and operating an E&E system is table stakes for our key staff. Table 3-3 summarizes the selection criteria we used to build your CalSAWS M&E Services team.

Selection Criteria	Why It Is Critical to Your Success	How Our Team Meets This Need
<b>HHS Delivery Experience in California</b>	California is one of the most unique HHS environments in the US. Understanding its history and nuances is important for M&E stakeholder relationships.	<ul style="list-style-type: none"> <li>• Our key staff have 128 years of combined experience working with California.</li> <li>• We are the only vendor to have key staff and a leadership team with experience maintaining and enhancing the majority of California counties—54 of the 58 County eligibility systems (i.e., CalWIN, ISAWS, LA LEADER and LRS).</li> <li>• Six (6) of our key staff (i.e., Rakesh Dutttagupta, Surranjan Kumar, Jerry Nielson, Mufaddal Tinmaker, Kishan Mallur and Debi Mohanty have experience working with CalSAWS, CalHEERS or one of the legacy SAWS systems.</li> <li>• Our Deputy Project Manager, Duncan Gilliam, and Advisor, Rachel Frey, have collectively worked on LA LEADER, ISAWS, CalWIN, CalHEERS, CalWIN ISS, and BenefitsCal.</li> </ul>

Selection Criteria	Why It Is Critical to Your Success	How Our Team Meets This Need
<b>Statewide M&amp;E experience with eligibility systems and extensive E&amp;E domain understanding</b>	The size and complexity of the project can quickly grind it to a halt if the team is inexperienced and does not understand the intricacies, policies, and constraints of E&E programs.	<ul style="list-style-type: none"> <li>• Our key staff members exceed all your mandatory and desired qualifications, have dedicated their careers to HHS program delivery and have led (or been involved in) statewide E&amp;E systems.</li> <li>• Our key staff bring 240 years of experience in M&amp;E.</li> </ul>
<b>Multi-state / federal Experience</b>	While having California E&E experience is important, being on the same project limits an individual's perspective to just what they know. Having multi-state experience and the ability to draw on experience from other state / federal projects is critical. Our BenefitsCal drew upon resources from our Center for Disease Control (CDC) vaccine management cloud-native, serverless system implementation to architect the BenefitsCal solution.	<ul style="list-style-type: none"> <li>• Our key staff and leadership team have worked across 21 of states supporting infrastructure and operations for statewide HHS systems and the federal government.</li> </ul>
<b>Large-scale project management experience in a multi-vendor environment</b>	Once fully integrated, the CalSAWS M&E will be the largest of its kind. This will require an experienced leader of large complex projects who can hold the line for all stakeholders.	<ul style="list-style-type: none"> <li>• Each of our key staff and leadership team reflected in this response have worked with multiple vendors, in addition to IV&amp;V and/or QA vendors and see this as just part of their daily environment.</li> <li>• Rachel and Duncan have worked in the CalSAWS multi-vendor environment as part of BenefitsCal and CalWIN ISS.</li> </ul>
<b>Transition Experience from the Incumbent Vendor on a HHS engagement</b>	Transitioning from one vendor to another can often lead to disruptions in service—something the CalSAWS Counties and the Customers that they serve cannot afford.	<ul style="list-style-type: none"> <li>• Our Transition Manager, Mike Henry, led the CalHEERS transition from Accenture to Deloitte with no disruption in service. As part of the transition Mike led a team to identify improvements that were introduced during the transition that reduced effort and cost.</li> </ul>

Selection Criteria	Why It Is Critical to Your Success	How Our Team Meets This Need
<b>Complex stakeholder environment experience</b>	California is the nation's most diverse state. The CalSAWS user base also represents this population. Navigation a complex ecosystem requires individuals not just with strong communication skills but experience the lived experience of challenging environments.	<ul style="list-style-type: none"> <li>• Our key staff all have over 172 combined years of experience leading large complex projects with complex stakeholder environments.</li> <li>• Rakesh Duttgupta, Duncan Gilliam, Debi Mohanty, Mike Henry, Kishan Mallur, Jerry Nielson, Mufaddal Tinmaker and Rachel Frey have served and/or are currently serving common State Sponsors, Counties, federal partners as CalSAWS.</li> <li>• Additionally, we have engaged Frank Mecca, former CWDA Executive Director to serve in the capacity of stakeholder advisor to bring insight into stakeholder engagement activities with State Sponsors, employment unions, advocates and Counties.</li> </ul>
<b>Innovation integrated into all project aspects not just for fixed tasks.</b>	Where CalSAWS is establishing a foundation for service delivery transformation, it requires an injection of ongoing innovation in EVERY change that is introduced. That requires a different way of thinking for everyone on the CalSAWS project.	<ul style="list-style-type: none"> <li>• Our collective key staff and leadership team have helped 20 HHS state level agencies with innovating their business operations.</li> <li>• Our collective team drives efforts in their respective states for federal granting programs (e.g., FNS Process and Technology Improvement Grant). Roberto drove the efforts for the recent award for Colorado's Department of Human Services Call Center and Automated Workflow submission. He also drove the latest introduction of AI supporting processing of mid-period certifications.</li> </ul>
<b>Evolving a lift and shift IaaS-hosted application to a cloud-native, serverless architecture</b>	As CalSAWS evolves to a cloud-native, serverless architecture, the Consortium and Counties will rely on their M&E vendor to help keep them ahead of the curve to avoid unwanted surprises and contain unexpected cloud costs.	<ul style="list-style-type: none"> <li>• Our Enterprise Architect, Lori Olson, defined CalHEERS roadmap to move to a cloud-native solution that moves away from expensive COTS products. She drove the efforts associated with the database migration from Oracle to open-source Aurora PostgreSQL.</li> <li>• Debi Mohanty, our Security Manager, defined the approach to securing CalHEERS in the newly evolved application architecture and serves as a Security Advisor for our BenefitsCal team.</li> </ul>
<b>Prior working relationships serving the same team or project</b>	Tenured relationships with trusted industry partners allow us to move forward faster, with enhanced communications and a common knowledge of existing operations.	<ul style="list-style-type: none"> <li>• Several of our team members have served and/or are serving CalSAWS, CalHEERS, BenefitsCal, and other Consortium projects. We have established and continue to build on these connections, which help us better serve the people of California with you.</li> </ul>

**Table 3-3. Selection Criteria for Deloitte Staff.**

## Mixing the Right Business Chemistry Profiles

On top of the criteria above, we look to staff our teams with a mindset towards diversity in experience, approach, and thought. For years, we have staffed projects by looking to the different styles, or business chemistries, of our team members to make sure the chemical reaction results in a balanced team whose members complement each other. Deloitte's Business Chemistry® draws upon the latest analytics technologies to reveal four scientifically based patterns of behavior within business.

The scope of the M&E services contract heightens the need for different working styles: from driving project schedules to pioneering new technologies to performing detailed root causes analyses for service desk incidents to having an empathetic way of engaging with Counties, Customers and Community Based Organizations who reach out to the Contact Center. When staffing with people that all have the same working style or require the same working style individuals start to conform which can lead to suboptimal results. We emphasize the need for our staff to remain authentic to who they are as that is when they deliver their best. The four types are shown in Figure 3-4.



Pioneers love exploring new possibilities. They particularly enjoy working with others and generating novel ideas.



Drivers love a challenge. They value competence and particularly enjoy a sharp mind or sharp wit.



Integrators are all about connection. They value meaning and enjoy exploring different interpretations or perspectives.



Guardians value stability and strive for accuracy and certainty. They focus on details and are known for bringing order to chaos.

CA\_CONL\_CalSAWS M&O\_M&O-379038\_2022-0106

**Figure 3-4. Deloitte's Business Chemistry Four Types.**

Developed by scientists, the system is designed to provide insights about individuals and teams based on observable traits and preferences. By understanding these differences, our proposed staff improve the effectiveness of their interactions with other types of individuals, as well as combinations of types in team environments. We have included the business chemistry profiles for each of our proposed staff so that you may better understand their styles and why we have selected them as part of our team.



### 3.1.1.2 Staff Responsibilities

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**RFP Reference: 5.3.2.1.2 Staff Responsibilities**

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All proposed Contractor Staff must have good oral and written communication skills. One aspect of good oral communication skills includes the ability to communicate with diverse groups of users and to convey information technology terms and concepts to non-technical audiences.

All Contractor Staff must prepare for and actively participate in designated Project meetings and represent the best interests of the Consortium and identify and escalate issues as appropriate.

To facilitate Project progress, it is important to the Consortium that the M&E Contractor minimizes Staff turnover to the extent possible, particularly for Key Staff as detailed below.

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#### **Communication Skills and Working with Diverse Groups**

Poor communication skills, both oral and written, are detrimental to a work environment and its people. What can be even more harmful are individuals who have difficulties with listening that causes extreme frustration when people are not feeling heard. This can happen in many forms including not proactively reaching out to understand what the Counties are experiencing as it relates to M&E services. Communicating out is as important as reaching out to gain this perspective through formal channels like the CRFI process but also through field observation, interviews and focus group sessions.

Our proposed staff bring, at a minimum, a bachelor's degree in their chosen field, experience working in diverse groups, and excellent communication skills, both written and oral. Our staff also undergo a rigorous hiring process that include multiple interviews where we assess their ability communicate. The interviews include both behavioral interviews and case studies and being interviewed by multiple Deloitte staff. This enables us to confirm:

- Ability to convey IT terms and concepts to non-technical audiences and using business and program terminology accurately to relate to policy and program staff.
- Ability to perform their assigned role and corresponding tasks and responsibilities.
- Ability to prepare for, and actively participate, in designated project meetings and represent the best interests of the Consortium.

Additionally, as Deloitte staff progress in their career they receive ongoing training commensurate with their level. They can also sign up for non-career progression trainings including our "Art of..." series. This training series focuses on listening, empathy and storytelling. Some of these training specifically focus on oral and written communication skills. In the event a team member communication skill does not meet expectations of the Consortium they will be addressed, or the individual removed from the project.

## Communicating With Diverse Groups of Users

The Consortium's deals with diverse groups of people. This includes their own staff, multiple contractors, County staff (inclusive of County IT Departments), Customers, CWDA, the Joint Powers Authority (JPA) Board, the Project Steering Committee (PSC), CalSAWS committee members, State Sponsors, employment unions, and advocacy groups. Our team brings with it the shared experience of having spent over the last two years with CalSAWS engaging with the above groups in addition to Federal IT meetings. Communicating technical concepts in lay-person terms is important to get diverse groups of people to agree on requirements, designs, and project plans. All of our team members are trained in human centered design concepts which extends to communications – it is not just limited to designing of systems. We also employ some of the approach below to communicate technical concepts:

- Include the right person from the team who understands the technical detail.
- Provide information in a digestible format and do not overwhelm when discussing technical concepts. Utilize a summary and detail approach to break complex topics into subtopics.
- Understand the lexicon of the groups and/or background of people or users with whom you are communicating (i.e., speak the language of the audience whether it is the JPA, PSC, State Sponsors, CWDA, Counties, the Consortium or other CalSAWS contractors).
- Provide pre-read materials that people can read on their own to help digest topics.
- Hold regular communication touchpoint meetings to address questions across stakeholder groups.
- Provide Quick Reference Guides (QRGs) that break down instructions and common issues in a step-by-step manner.
- Use simplified terminology and engaging visuals, such as showing screenshots or doing live demos, to help aid non-technical audiences.

Lastly, the Deloitte leadership team is prepared to approach each group inclusively. This way, we can tailor communication methods and styles as needed. We are a diverse group of professionals which provides us with many opportunities to see and hear unique perspectives and suggestions from everyone. We highly value an equitable communications standard that is inclusive and fosters belonging across the Consortium, Deloitte, State Sponsors/Staff, the Counties, CWDA and other CalSAWS contractors.

## Project Meeting Preparation and Participation

We have assembled a team that understands the importance of informed preparation and active participation. Whether we are involved in status meetings, strategy sessions, or one-off encounters, our team gets behind each effort with the most relevant, up-to-date information available to represent the best interests of the Consortium and Counties. Our team members spend time ahead of joint gatherings to prepare to report

project status and metrics for key meetings. This effort enables us to actively assess and address any issues at hand before briefing appropriate stakeholders. It enables us to develop risk mitigation strategies as a Deloitte team or our CalSAWS contractor teammates when appropriate.

Whether we are participating or leading conversations at PSC, JPA, Committee Meetings (e.g., CalWORKs, CalFresh), Federal IT meetings, State Sponsor Meetings, CDSS Stakeholder meetings or Weekly Status Meetings, our team is prepared to actively engage, collaborate, and represent the Consortium's best interests. This entails engaging with the Consortium prior to presenting information to agree on any key messages or sensitive topic points of discussion.

Since any given collection of individuals in a meeting may not have all the answers or information presently available, our team comes prepared for the possibility that we may need to seek out further details to return to the interested stakeholder. We then return with answers as soon as they are readily available or at the time of the next meeting, whichever is agreed upon by the Consortium, Deloitte, and other CalSAWS contractors.

## **Identifying and Escalating Issues**

Being unable to promptly identify, address, and/or escalate project issues can impede productivity, increase rework, and jeopardize the quality and timeliness of important CalSAWS activities. We follow the Consortium's processes documented in the Project Control Document (PCD) in managing issues, with an emphasis on trying to resolve issues at the lowest level of the organization. This will help improve project delivery speed. Based on our experience, we realistically assess the impact of a risk and potential for it to become an issue. Issues and risks always surface, but they may have already been addressed by us in another project. This knowledge helps reduce this project's overall project risk profile.

Deloitte proposes to utilize the Consortium's risk and issue tool to log and track issues and streamline the issue escalation process to provide transparency among project team members and management for informed decision-making during transition-in. One of the current challenges with the risk and issue log is that it is highly manual requiring individuals to manually notify individuals when changes are needed or have been made. By shifting to Jira to use for issue and risk tracking the manual effort can be almost eliminated. Issues can arise at various phases of the lifecycle, and the team needs to address these in a timely manner to prevent negative impacts to schedule, scope, quality, and budget. Deloitte follows a six-step approach to issue management, which closely aligns with Consortiums four-step issue management process. This process is outlined in Figure 3-5 and Table 3-4 below.

**Figure 3-5. Issue Management Process.**

Steps	Description
<b>Step 1: Issue Identification</b>	A potential issue that may impact project progress is identified.
<b>Step 2: Issue Documentation and Tracking</b>	Based on the issue's source, the issue is logged into the risk and issue management tool in SharePoint to track the issue to completion. The identifying party is responsible for entering a description of the issue, identification date, and the potential team responsible for resolving the issue.
<b>Step 3: Issue Analysis</b>	Deloitte team members analyze the issue and perform an initial evaluation of the source, cause, and system as well as business impact and develop recommendations for resolution. An initial priority of the issue is also determined at this point to enable appropriate escalation of the issue. Once the priority is determined, it is assigned to a project team member for resolution with a planned issue resolution date. Issues that cannot be resolved at lower levels within the project team are escalated to Section Directors and subsequently presented at the risk management group.
<b>Step 4: Issue Escalation</b>	Depending on many factors, including the issue's effect on scope, budget, quality, and schedule and the impact on business users, the issue is escalated to risk management group.
<b>Step 5: Issue Categorization and Prioritization</b>	The Consortium and Deloitte collaboratively identify the category of business area to which the issue belongs, the priority of the issue, and a plan for resolution that includes the target due date and assigned resources.
<b>Step 6: Issue Resolution</b>	Deloitte works with the Consortium team to resolve the issue. Once an issue is resolved, it is marked as complete in the risk and issue management tool, as appropriate.

**Table 3-4. Key Steps of Issue Management Process.**

## **Approach to Minimizing Staff Turnover**

What attracts a person to a particular project role is often different from what keeps that person there for the longer term. While some turnover is normal, high turnover is costly and may lead to avoidable project-related delays and confusion. The pandemic created an environment that the market collectively, including the Counties, has never seen where individuals' priorities dramatically shifted causing a number of people to rethink their career choices. Deloitte was no exception to being impacted by these

choices; however, during this period of time Deloitte re-invested in its people growing our overall headcount by 40% and most recently announcing a significant expansion in the development of our people. Project 120 is already delivering over one million hours of training on applications of technologies like artificial intelligence (AI), cloud, cyber, data analytics, 5G, through the Deloitte Technology Academy.

Staff thrive when the work environment supports them in achieving a common set of goals and objectives. Based on past implementation projects of similar nature and complexity, Deloitte understands the importance of the Consortium's need to work with familiar faces in every phase of the project. Our approach for minimizing turnover is to focus on investing in a meaningful career for our practitioners. As a result, Deloitte is a recognized leader where individuals want to work and grow. Our approach minimizes turnover and leads to long-term continuity of resources on our engagements even during this new transition in the market where professionals frequently change careers. Figure 3-6 highlights just a few of our accolades we have received.

#### DELOITTE AWARDS & RECOGNITION



Deloitte has been named one of the most community-minded companies in the nation by **Points of Light-Civic 50**.



2021 marks Deloitte's 22nd year on **FORTUNE Magazine's** list of the "100 Best Companies to Work For"



Deloitte ranks 7th in the **2021 LinkedIn Top US Companies** list. *The list is based on interest in the organization, engagement with the organization's employees, job demand and employee retention.*



Deloitte is ranked 13th in **Universum's** list for "**Most Attractive Employers**" for business and commerce for 2021



Deloitte ranks 3rd on **FORTUNE's Best Workplaces In Consulting & Professional Services**

CA\_CON\_CalSAWS M&O\_MO-379038\_2022-0208

**Figure 3-6. Deloitte's Reputation as an Employer of Choices Helps us Minimize Turnover.**

Due to the breadth of our services, we have an extensive and long-term investment in our practitioners. Our staff stay with Deloitte long-term because we invest in their training, reward them for high performance, provide them with a sense of community, offer competitive benefits, support wellness and lifestyle flexibility, and expose them to a diverse set of clients. Table 3-5 below details strategies we use to minimize turnover.



Method	Description
<b>Training</b>	<ul style="list-style-type: none"> <li>• <b>Deloitte University</b> – Located in Westlake, TX, DU is our premier learning and leadership development facility, which serves as a catalyst for technical, professional, and leadership development. Attendees are immersed in Deloitte culture where they can build meaningful relationships across the firm, increasing employee morale and retention.</li> <li>• <b>Deloitte Internal Boot camps</b> – We support the continuous education of our personnel by providing intensive training sessions for topics including Project Management, Hybrid Agile, Big Data, and Eligibility and Enrolment while employing cross-training and apprenticeship programs to build skills across systems and increase value. Deloitte stands out as a place where people seeking different types of work can retool their skillsets internally rather than leave to find opportunities elsewhere.</li> <li>• <b>Communities of Practice</b> – Deloitte fosters a culture of knowledge sharing across the firm through forums like the Global Cloud Community and Yammer, where practitioners can freely exchange ideas and best practices.</li> <li>• Our <b>HHS Nerve center</b> is a professional network of practitioners from across the firm where policies, technologies, and best practices related to social service transformation can be discussed and shared. This deep knowledge pool allows skilled practitioners to have room to develop and grow within Deloitte.</li> <li>• <b>Sponsored Certifications</b> – With free access to learning resources, practitioners often have the option to seek out certifications and build new skills, ranging from soft skills like project management to technical skills like SQL. Deloitte even provides sponsorship for the official <b>Agile certifications</b> required for large scale IT implementation projects.</li> </ul>
<b>Rewards and Recognition</b>	Practitioners who make unique and outstanding contributions are awarded with Shout Outs and Spot Awards through our Rewards and Recognition (R&R) program to make them feel valued, which helps with retention. Deloitte's Total Rewards and Benefits program offers a comprehensive variety of programs and resources to support the life journey of our professionals.
<b>Community Building</b>	Deloitte's efforts in retaining our practitioners and our contractors go beyond supporting their professional careers. Community work helps our employees find ways to connect to the work we do to the people we work with and the clients we serve. These connections are achieved by a wide range of activities, including office events, non-profit activities, and community volunteering. Impact Day, which takes place every June, is a national day of giving back to the community. We invite all employees, including our subcontractors, to volunteer their day to non-profit work close to their hearts.
<b>Competitive Benefits</b>	We recognize that demand for competitive benefits from staff is at an all-time high in this fast-evolving market. To meet these demands and retain our employees, Deloitte stands out from its competitors in offering an excellent benefits package, complete with over 20 days of annual PTO, 401K matching, pension plans, 6 months of parental leave, and subsidies for equipment and travel.

Method	Description
<b>Wellness Support</b>	Our well-being programs offer opportunities for our employees to use discounts and subsidies towards a variety of fitness activities and provide virtual fitness throughout the week. A wellness goal-setting kit, available to all practitioners, gives employees a comprehensive tool to set mental and physical wellness goals.
<b>Diverse Staffing Opportunities</b>	Deloitte has hundreds of clients across its consulting practice, giving staff ample opportunity to experience different projects and pick up new skills that they can apply in the future. These opportunities create a dynamic environment where practitioners can often find new ways to grow professionally internally at Deloitte rather than seek opportunities elsewhere. Our named staff have worked with 21 unique state and federal clients.

**Table 3-5. Examples of Methods Deloitte Uses to Minimize Turnover.**

### 3.1.1.3 Contractor Staff Changes

#### RFP Reference: 5.3.2.1.3 Contractor Staff Changes

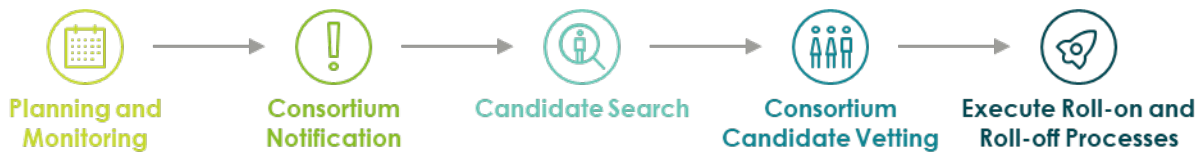
For any expected M&E Key Staff changes, the Contractor will provide a 30-calendar Day notice to the Consortium Executive Director regarding the change and plans for transition. The M&E Contractor will provide at least two resumes with proof of experience that meets or exceeds the mandatory qualifications as defined in this RFP, and two references for any recommended replacement Key Staff. The Consortium reserves the right to require face-to-face or video interviews of all proposed replacement Key Staff. The Consortium reserves the right to accept or reject any proposed Key Staff.

For any unexpected Key Staff changes, the Contractor will provide a written notification to the Consortium Executive Director within three business days of knowledge. Within seven (7) calendar days of providing such written notice, the Contractor will provide the Consortium Executive Director with plans for transition. All provisions in the preceding paragraph also apply to unexpected Key Staff changes, except for the 30-Day notice.

We track and deploy over 120,000 staff that serve government and private sector clients in the United States. This experience allows us to effectively staff the CalSAWS M&E services contract with highly qualified people. We plan each project individually and account for how each phase fits into the overall project plan and staffing model. Our staffing plan delivers the right number of people in the right phase of the project, confirming the project stays on schedule and mitigates risks. There are instances when staff will need to change. We adhere to the Consortium's requirements above for expected and unexpected staff changes. Our approach for each is further detailed below.

### Addressing Expected Key Staff Changes

With an extensive history of projects here in California, we thoroughly understand the intricacies of staffing individuals who can get the job done and manage others for the right performance expectations. We have a well-defined process to manage, review, and inform the Consortium and CalSAWS contractors of any staffing changes. Figure 3-7 highlights our key activities for proactively managing staff changes, and we further detail each step below.



CA\_CON\_CalSAWS M&O\_MO-379038\_2022-0207

**Figure 3-7. Proactively Managing Staff Changes.**

- **Planning and Monitoring** – Our PMO Lead, Donna, jointly with our Contract Manager, Susanne Nielson, continually assess and confirm full compliance with the RFP requirements and defined scope of work, applying our practices for managing project schedule, scope, and resources. We make every effort to minimize staffing turnover to the maximum extent possible, especially for Key Staff. We proactively address personnel issues, track staffing ramp-up and ramp-down periods, providing ongoing training, conducting cross-role training, and fostering team dynamics among the Consortium, State Sponsors, CWDA, County, and Consortium contractor staff and other contractors.
- **Consortium Notification** – Our Project Manager, Rakesh, will give written notification to Project leaders, including the Consortium Executive Director, within 30 calendar-days if the need for a planned staff transition arises. Deloitte's national staffing managers can quickly mobilize and deploy people with the right mix of skills and experience for specific project roles, drawn from across the U.S.
- **Candidate Search** – We determine the skills and experience required for project staff based on Scope of Work requirements, the role, tasks in scope for the project, and experience on comparable projects. We work with internal resource managers to generate a list of qualified candidates once required skills and experience are identified. Our management team performs an analysis, including pre-deployment interviews and confirmation of role alignment with practitioners' professional goals, to determine candidates meet the project's expectations.
- **Consortium Candidate Vetting** – Rakesh provides two resumes for recommended replacements and two references to review for each key staff replacement. A transition plan describing the approach for handoff and knowledge transfer between the current and replacement staff is provided within seven days of providing written notice of a transition and enacted to minimize the risk and impact to the project.
- **Execute Roll-on and Roll-off Processes** – Our onboarding lead orderly manage staff departures to reduce impacts to project activities, which includes conducting transition planning with scheduled and unscheduled staffing modifications, conducting transition and training of new staff with departing staff, and conducting exit interviews with departing staff to identify opportunities for improvement.

## **Addressing Unexpected Key Staff Changes**

If a team member must be absent due to unforeseen circumstances, Rakesh provides the Consortium Executive Director a written notification within three business days of knowledge and required Key Staff action. Within seven calendar days of providing written notice, Rakesh provides the Consortium Executive Director with plans for transition. Rakesh provides the Consortium at least two resumes and two references for any recommended replacement staff, reserving the right for the Consortium to conduct face-to-face or phone interviews of all proposed replacement staff and to accept or reject any proposed staff.

Project timelines and milestones are continually met according to the work plan with a qualified coverage resource able to fulfill the responsibilities of the role until a permanent resource is identified. If a staff change becomes imminent, we aim to provide an effective transition by staffing engagements with a percentage of coverage resources. We can quickly access a coverage resource to temporarily fill the role, and then draw from our previously identified candidate pool. During this process, our leads explain to potential new project team members the roles and project they are being considered for. We further document roles and responsibilities in the project staffing plan, which is provided to all new project members. The project staffing plan includes all roles, including non-key staff roles defined in Attachment B13 – M&E Staffing Worksheets.

### **3.1.1.4 Staff Performance**

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#### **RFP Reference: 5.3.2.1.4 Staff Performance**

The Contractor Staff will possess the skills and experience necessary to fulfill the responsibilities and requirements of this RFP. The Contractor will 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 Contractor Staff, the Executive Director will notify the appropriate Project Manager as soon as is reasonably possible. If the Executive Director requests removal of any M&E Staff person, the Contractor will immediately remove such Staff from the Project.

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## **Skills and Experience Necessary to Fulfill Responsibilities**

Please refer to Section 3.1. 2 – M&E Key Staff for detailed information on our proposed team skills and experience.

## **Identifying and Correcting Performance Issues**

We proactively monitor staff performance across the team through internal reviews to mitigate issues early on and encourage our staff to bring their best in every instance. Rakesh has defined a careful set of measures to effectively manage team performance during the project by evaluating members on an ongoing basis. These measures help us maintain awareness of an individual's contributions to the project and their overall performance. These measures are:



- **Work Quality:** Our leads and managers check the accuracy, completeness, and thoroughness of submitted work products and deliverables. They also periodically evaluate the team member's roles and responsibilities to confirm assigned tasks are being properly executed. Performance check-ins with staff happen bi-weekly, giving the opportunity for staff to capture feedback and self-correct in a timely fashion. Work quality metrics focus on standards, errors, waste, and occurrences of rework. They also help identify staff who produce quality work that exceeds standards defined by the Consortium and/or Rakesh.
- **Work Efficiency:** Leads and Managers evaluate team members on the timeliness of work products, deliverables and assigned tasks. For example, Donna may compare historical estimates to the actual time a particular team member takes to complete a task. Major deviations may lead to one-on-one coaching or a performance discussion. Efficiency metrics focus on timely delivery of work per scheduled deadlines. It also helps recognize staff who produce work on-time, reducing project-related risks, impediments, or delays.
- **Consortium and Team Feedback:** Rakesh inventories the perception and noteworthy actions of a staff member, based on candid feedback from Consortium staff and team members. He can get tangible feedback regarding whether a staff member is helpful to team members and counterparts and sets a tone of cooperation.

Throughout the contract, there are tactical activities, outlined in Table 3-6, our management team monitors and reviews staff performance.

Activity	Description
<b>Bi-weekly Check-ins</b>	<ul style="list-style-type: none"> <li>• Project Manager (PM) checks in weekly with each thread manager to track task assignment, completion, and impediments.</li> <li>• Managers and leads provide feedback on tasks that may be at risk of being delayed or blocked.</li> <li>• PM supports team leads in collaborating across threads and with the appropriate Consortium or Consortium contractor team.</li> <li>• PM gets feedback from team leads on how their staff are performing and any staff-specific concerns.</li> <li>• Team leads check on their staff to confirm assigned work is on track to be completed and provide support in helping close activities in a timely and accurate manner.</li> </ul>
<b>Quarterly Performance Reviews</b>	<ul style="list-style-type: none"> <li>• PM meets with team leads to review and detail expectations by providing measurable and achievable goals.</li> <li>• PM explains the rewards for meeting the goals and the consequences for failing to reach defined targets.</li> <li>• PM works with team leads to provide formal feedback to team members within the Deloitte leadership team.</li> <li>• Deloitte uses a quarterly 'snapshot' program to evaluate staff on pre-defined dimensions of client-focused performance.</li> <li>• Team leads meet with their staff to review assigned tasks and duties and explain their role in the larger scope of activities assigned to their thread.</li> </ul>



Activity	Description
<b>Documented Performance Concerns, with Defined Mitigation Plans</b>	<ul style="list-style-type: none"> <li>Manager/Lead communicates a verbal warning directly to staff who violate a company or project rule; identifies mitigation strategies; documents the infraction with the employee's name, date, and time; and places a copy in the employee's personnel file within Deloitte HR applications or sent to teammate firms.</li> </ul>
<b>Employ Appropriate Disciplinary Action, Based on Performance and Severity</b>	<ul style="list-style-type: none"> <li>PM proceeds with appropriate disciplinary action, based on repeated violation of same company rule. The same may apply if overall productivity and performance of the staff member is seen as deteriorating.</li> <li>Consequences reflect the infraction, but could include retraining, probation, demotion, loss of hours, or termination. The CalSAWS Executive Director is informed before such actions are taken against a member of the Deloitte Team.</li> </ul>

**Table 3-6. Performance Review Activities Carried Out by the Deloitte Leadership Team.**

These simple monitoring, mitigation, and escalation procedures provide clarity for our staff regarding expectations for performance and behavior. We provide rules that are easy to follow and easy to enforce, especially when the team has clear, consistent, and open communications. Lastly, we are careful to recruit and select for projects individuals of the highest caliber, making it rare that these disciplinary practices need to be applied.

## **Procedures for Consortium Identified Performance Issues**

If the Consortium brings any performance issues with our staff, Rakesh is responsible for verifying the issue raised and addressing it. Our goal is to identify and address performance issue before they are raised to the Executive Director as noted in the previous section. The Deloitte Team is proactive when it comes to performance related issues. If an individual has been identified with performance related issues during check-ins and performance reviews, our management team documents any concerns and create mitigation plans for the individual. Furthermore, if the performance issue remains, the Deloitte Leadership team employs corrective actions related to performance and the severity of the issue.

If the Executive Director requests removal of one of our team members, Rakesh verifies the issue resulting in the request. He then initiates the staff roll-off procedures and staff identification procedures described in Section 3.1.1.3 – Contractor Staff Changes.

### 3.1.1.5 Staffing Worksheets (ME-S2)

**RFP Reference: 5.3.2.1 M&E Staffing Approach**

**Attachment B10 Requirements: ME-S2**

**ME-S2:** The Bidder will complete Attachment B13 – M&E Staffing Worksheets describing the roles and level of effort (hours) to provide M&E Services.

The completed M&E Staffing Worksheets, in the required format, will be provided separately as “Attachment B13 – M&E Staffing Worksheets” within Volume 1B – M&E Business Proposal, Part 2.

### 3.1.2 M&E Key Staff

**RFP Reference: 5.3.2.2 M&E Key Staff**

Bidders submitting an M&E Proposal must include the following twelve (12) Key Staff.

- |                                     |                            |
|-------------------------------------|----------------------------|
| 1) M&E Project Manager              | 7) M&E Technical Manager   |
| 2) M&E PMO Lead                     | 8) M&E Application Manager |
| 3) M&E Delivery Integration Manager | 9) M&E Security Manager    |
| 4) M&E Transition Manager           | 10) M&E Testing Manager    |
| 5) M&E Innovation Lead              | 11) M&E Release Manager    |
| 6) M&E Enterprise Architect         | 12) M&E Project Scheduler  |

M&E Key Staff minimum qualifications requirements are contained in the M&E SOW. Key Staff will be scored according to Section 8 - Evaluation.

The people you choose to work with help define a project's success. Our Deloitte M&E Management, shown in Figure 3-8, has been carefully selected based on their professional background and years of experience in HHS. Each of them has experience working either directly with California Counties, and/or supporting other state HHS agencies in their area of specialty that aligns with CalSAWS needs.





**Figure 3-8. The M&E Leadership Team.**

### 3.1.2.1 M&E Project Manager

#### Attachment B10 Requirements: ME-S3-S7





**Rakesh Duttagupta**  
M&E Project Manager










*"I look forward to putting my 20+ years of E&E and HHS experience to work to make the Consortium successful in all its key initiatives, helping Counties support Californians in need."*

#### Why is Rakesh right for this role?

Rakesh exceeds all skills, qualifications, and requirements for the project position. He has E&E multi-state experience across Washington, Wyoming, Nevada, and California. Rakesh is familiar with California SAWS. In California he served as the Project Manager on ISAWS and moved up to the position of Project Manager on CalWIN. In Wyoming he led project that included a transition from the incumbent vendor to take over the eligibility system. In Nevada his team incrementally modernized the E&E solution and introduced one of Deloitte's first chatbots. Overall, Rakesh has **20 years** of experience in **Health and Human Services** working with stakeholders and contractors to oversee all integration processes. Rakesh is a certified **Project Management Professional**.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S3: A minimum of three (3) years of experience within the past ten (10) years, on a large and complex IT health and human services or health care system that is in Production.	<b>Wyoming Department of Health – Wyoming Eligibility System (WES)</b> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>77 Months</li> </ul>	<b>Nevada Division of Welfare and Supportive Services – Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP &amp; TANF)</b> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>125 Months</li> </ul>	<p>36 months required</p>  <p><b>EXCEEDS</b></p> <p>202 months of experience</p> <p>Duration in months (% applied) <b>60.6 months of experience</b></p>
ME-S4: A minimum of five (5) years of experience as a Project Manager or Project Director within the past (10) years being directly responsible for activities in the following Project Management knowledge areas: scope, time, cost, human resource, risk, quality, integration, and communication.	<b>Wyoming Department of Health – WES</b> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>77 Months</li> </ul>	<b>Nevada Division of Welfare and Supportive Services– Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP &amp; TANF)</b> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>125 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p>202 months of experience</p> <p>Duration in months (% applied) <b>60.6 months of experience</b></p>


<div>  <div> <b>Rakesh Duttagupta</b>  M&amp;E Project Manager </div> <div>   </div> </div> <p><i>"I look forward to putting my 20+ years of E&amp;E and HHS experience to work to make the Consortium successful in all its key initiatives, helping Counties support Californians in need."</i></p>			
<p>ME-S5: A minimum of five (5) years of experience within the past ten (10) years, supervising teams of 50 people or greater on Projects that involved large and complex IT systems.</p>	<p><b>Wyoming Department of Health – WES</b></p> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>77 Months</li> </ul>	<p><b>Nevada Division of Welfare and Supportive Services – Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP &amp; TANF)</b></p> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>125 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p>204 months of experience</p> <p>Duration in months (% applied) 60.6 months of experience</p>
<p>ME-S6: A minimum of five (5) years of experience within the past ten (10) years building and maintaining strong working relationships with clients and key internal and external stakeholders; conveying relevant information to an executive-level audience, ensuring client is aware of progress/service status; and building credibility and fostering business-partnering relationships.</p>	<p><b>Wyoming Department of Health – WES</b></p> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>77 Months</li> </ul>	<p><b>Nevada Division of Welfare and Supportive Services – Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP &amp; TANF)</b></p> <ul style="list-style-type: none"> <li>Contractor Manager/Project Executive (Director)</li> <li>125 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p>204 months of experience</p> <p>Duration in months (% applied) 60.6 months of experience</p>
<p>ME-S7: Possess and maintain a valid Project Management Institute (PMI) Project Management Professional (PMP) certification throughout the term of this Agreement.</p>	<p>Project Management Professional (PMP) Certified</p>		 <p><b>MEETS</b></p>

**Figure 3-9. M&E Project Manager.**




### 3.1.2.2 M&E PMO Lead

#### Attachment B10 Requirements: ME-S8-S10




**Donna Cain**  
M&E PMO Lead







*"I'll work closely with the Consortium to make sure we are following PCD processes and clearly communicating across our joint management team on key activities"*

#### Why is Donna right for this role?

Donna exceeds all skills, qualifications, and requirements for the project position. She possesses a Project Management Institute (PMI) Project **Management Professional (PMP) certification, and over 30 years of experience serving as a Project Management Office Lead.** Donna also has **experience serving California and Health and Human Services clients.** Donna is a collaborative team leader, focused on exceeding client expectations, delivering quality products and deliverables, coaching and mentoring team members, and continually improving processes, project control methods and communication tools, including: defining and delivering Project Management Office (PMO) tools, processes and services; contract and scope management; risk, issue, decision and change management; using leading and collaborative practices to monitor and report project controls, progress and performance; facilitating on-time delivery of quality products; managing and communicating schedule performance; and coaching team members.

RFP Requirement	Relevant Project Experience	Requirement Met?
ME-S8: A minimum of three (3) years of experience within the past five (5) years leading a PMO in a systems integrator organization, Federal, State, County, or Consortium organization.	<div style="background-color: black; width: 150px; height: 100px; margin-bottom: 10px;"></div> <ul style="list-style-type: none"> <li>Project Management Office (PMO) / Quality Assurance (QA) Lead</li> <li>46 Months</li> </ul> <p><b>California Department of Public Health – Screening Information System (SIS) M&amp;O; COVID-19 Response System</b></p> <ul style="list-style-type: none"> <li>Results Management Office (RMO) Lead</li> <li>30 Months</li> </ul>	<p>OregONE Eligibility System for MAGI Eligibility and Enrollment; Integrated ONE System</p> <ul style="list-style-type: none"> <li>PMO Lead</li> <li>12 Months (within the past 5 years)</li> </ul> <p>36 months required</p> <div style="text-align: center;">  <p><b>EXCEEDS</b></p> </div> <p><b>88 months of experience</b></p> <p>Duration in months (% applied) <b>58 months of experience</b></p>




<p><b>Donna Cain</b> M&amp;E PMO Lead</p>   	<p><i>"I'll work closely with the Consortium to make sure we are following PCD processes and clearly communicating across our joint management team on key activities"</i></p>
<p>ME-S9: A minimum of three (3) years of experience directly responsible for supporting activities in the following Project Management knowledge areas: scope, time, cost, human resource, risk, quality, integration, and communication.</p>	<div>  <div> <p><b>OregONE Eligibility System for MAGI Eligibility and Enrollment; Integrated ONE System</b></p> <ul style="list-style-type: none"> <li>• PMO Lead</li> <li>• 53 Months</li> </ul> <p><b>Montana Department of Public Health and Human Services – Combined Health Information Management System – Enterprise Architecture</b></p> <ul style="list-style-type: none"> <li>• PMO Lead</li> <li>• 18 Months</li> </ul> </div> <div> <p>36 months required</p>  <p><b>147 months of experience</b></p> <p>Duration in months (% applied)</p> <p><b>117 months of experience</b></p> </div> </div>
<p>ME-S10: Possess and maintain a valid Project Management Institute (PMI) Project Management Professional (PMP) certification throughout the term of this Agreement.</p>	<p>Project Management Professional (PMP) Certified</p> <div>  </div>



**Figure 3-10. M&E PMO Lead.**

### 3.1.2.3 M&E Delivery Integration Manager

#### Attachment B10 Requirements: ME-S11-S14





**Kishan Mallur**  
M&E Delivery Integration Manager









*"My overriding goal it to make your delivery integration a reality. I'll work to operationalize processes across vendors to help deliver results and quality."*

#### Why is Kishan right for this role?

Kishan exceeds all skills, qualifications, and requirements for the project position with **9 years and 10 months within the past ten (10) years of experience across four projects**. As a technology leader with over **25 years of experience in state government**, higher education, and software, Kishan has a dynamic career built on strong leadership, relationship building, and creative problem solving. He built and managed teams responsible for product management, business development, software development, infrastructure, and day-to-day operations for key IT service offerings. He has served in key integration roles with several large and diverse stakeholder groups at the Commonwealth of Massachusetts. In his role in Massachusetts, he successfully brought together multiple vendors to deliver the scope of services for the Medicaid Enterprise Systems and Integrated Eligibility & Enrollment projects. He comes at the role of the Delivery Integration Manager through a client lens, having walked in similar shoes as the Consortium. Kishan is a strong motivator/leader especially adept at facilitating Business-IT conversations and public speaking.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S11: A minimum of two (2) years of experience coordinating multidisciplinary teams over various functional and technical areas in a leadership capacity on Projects that involved large and complex IT systems.	<p><b>Massachusetts Department of Health and Human Services - Integrated Eligibility &amp; Enrollment (IE&amp;E)</b></p> <ul style="list-style-type: none"> <li>• Technical Director</li> <li>• 39 Months</li> </ul> <p><b>Massachusetts Executive Office of Health and Human Services - Medicaid Enterprise Systems (MES)</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul>	<p><b>Executive Office of Technology Services and Security - Medicaid Management Information System (MMIS) Infrastructure Upgrade</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul> <p><b>Massachusetts Department of Health and Human Services &amp; Massachusetts Health Connector – Health Insurance Exchange &amp; Integrated Eligibility System</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 18 Months</li> </ul>	<p>24 months required</p> <div style="text-align: center;">   <b>EXCEEDS</b> </div> <p>103 months of experience</p>
ME-S12: A minimum of two (2) years of experience coordinating integration services on a Project similar in size and scale to the CalSAWS.	<p><b>Massachusetts Department of Health and IE&amp;E</b></p> <ul style="list-style-type: none"> <li>• Technical Director</li> <li>• 39 Months</li> </ul> <p><b>Massachusetts Executive Office of Health and Human Services - MES</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul>	<p><b>Executive Office of Technology Services and Security - MMIS Infrastructure Upgrade</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul> <p><b>Massachusetts Department of Health and Human Services &amp; Massachusetts Health Connector – Health Insurance Exchange &amp; Integrated Eligibility System</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 18 Months</li> </ul>	<p>24 months required</p> <div style="text-align: center;">   <b>EXCEEDS</b> </div> <p>103 months of experience</p>

<div>  <div> <b>Kishan Mallur</b>  M&amp;E Delivery Integration Manager </div> <div>   </div> </div> <p><i>"My overriding goal it to make your delivery integration a reality. I'll work to operationalize processes across vendors to help deliver results and quality."</i></p>			
<p>ME-S13: At least two (2) years of Full-Time Equivalent (FTE) experience utilizing traditional and iterative solution delivery methodologies.</p>	<p><b>Massachusetts Department of Health and IE&amp;E</b></p> <ul style="list-style-type: none"> <li>• Technical Director</li> <li>• 39 Months</li> </ul> <p><b>Massachusetts Executive Office of Health and Human Services - MES</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul>	<p><b>Executive Office of Technology Services and Security - MMIS Infrastructure Upgrade</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul> <p><b>Massachusetts Department of Health and Human Services &amp; Massachusetts Health Connector – Health Insurance Exchange &amp; Integrated Eligibility System</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 18 Months</li> </ul>	<p>24 months required</p>  <p><b>EXCEEDS</b></p> <p>103 months of experience</p>
<p>ME-S14: A minimum of five (5) years of experience within the past ten (10) years building and maintaining strong working relationships with clients and key internal and external stakeholders; conveying relevant information to an executive-level audience, ensuring client is aware of progress/service status; and building credibility and fostering business-partnering relationships.</p>	<p><b>Massachusetts Department of Health and IE&amp;E</b></p> <ul style="list-style-type: none"> <li>• Technical Director</li> <li>• 39 Months</li> </ul> <p><b>Massachusetts Executive Office of Health and Human Services - MES</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul>	<p><b>Executive Office of Technology Services and Security - MMIS Infrastructure Upgrade</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 23 Months</li> </ul> <p><b>Massachusetts Department of Health and Human Services &amp; Massachusetts Health Connector – Health Insurance Exchange &amp; Integrated Eligibility System</b></p> <ul style="list-style-type: none"> <li>• Program Manager</li> <li>• 18 Months</li> </ul>	<p>24 months required</p>  <p><b>EXCEEDS</b></p> <p>103 months of experience</p>

**Figure 3-11. M&E Delivery Integration Manager.**

### 3.1.2.4 M&E Transition Manager

#### Attachment B10 Requirements: ME-S15-S16





**Mike Henry**  
M&E Transition Manager




*"As I did with the CalHEERS and DMDC transitions, I'll bring a repeatable and transparent approach that enables Deloitte to pick up seamlessly from your current vendor."*



#### Why is Mike right for this role?

Mike exceeds all skills, qualifications, and requirements for this project position, having **successfully performed operational transition activities on 3 large and complex IT system projects** for state and federal clients. Most recently, he has led multiple large-scale transitions of large application portfolio and IT service management programs from incumbent vendors including from the CalSAWS incumbent vendor at CalHEERS. He is familiar with their processes, approach and style and has navigated through challenges such as documentation gaps and technology stack complexity. Mike brings his extensive experience providing strategic guidance to large scale system integration projects to the role of Infrastructure Transition Manager. Overall, Mike has 20 years of experience in large and complex IT implementations. The transition durations for his projects are a testament to his transition delivery experience.

RFP Requirement	Relevant Project Experience	Requirement Met?
ME-S15: A minimum of 18 months of experience within the past ten (10) years, performing operational transition activities on Projects involving large and complex IT systems.	<p><b>State of California - California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)</b></p> <ul style="list-style-type: none"> <li>Engagement Transition Manager</li> <li>9 Months (Includes 9 months transition for 12/02/2019 – 09/30/2020)</li> </ul>  <ul style="list-style-type: none"> <li>System Engineering Transition Director</li> <li>18 Months (includes 3 months transition for 06/01/2018 – 09/01/2018)</li> </ul>	<p>18 months required</p>  <p><b>EXCEEDS</b></p> <p><b>54 months of experience</b></p> <p><b>With 18 months of transition experience</b></p>




**Mike Henry**  
M&E Transition Manager

*"As I did with the CalHEERS and DMDC transitions, I'll bring a repeatable and transparent approach that enables Deloitte to pick up seamlessly from your current vendor."*

ME-S16: Experience within the past ten (10) years, managing the successful transition of large and complex IT systems from one (1) company or contract to another on at least two (2) separate Projects. The Transition Manager's experience will have been for a minimum duration of three (3) months for each Project.

<p><b>State of California - CalHEERS</b></p> <ul style="list-style-type: none"> <li>Engagement Transition Manager</li> <li>9 Months (Includes 9 months transition for 12/02/2019 – 09/30/2020)</li> <li>[REDACTED]</li> <li>System Engineering Transition Director</li> <li>18 Months (includes 3 months transition for 06/01/2018 – 09/01/2018)</li> </ul>	<p><b>State of Oregon – ONE Medicaid Eligibility Program Project</b></p> <ul style="list-style-type: none"> <li>Engagement Transition Manager</li> <li>27 Months ((includes 6 months transition for 11/01/2015 – 05/01/2016)</li> </ul>	<p>2 projects / 6 months required</p>  <p><b>3 projects / 54 months of experience</b></p>
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**Figure 3-12. M&E Transition Manager.**



## 3.1.2.5 M&E Innovation Lead

### Attachment B10 Requirements: ME-S17-S19



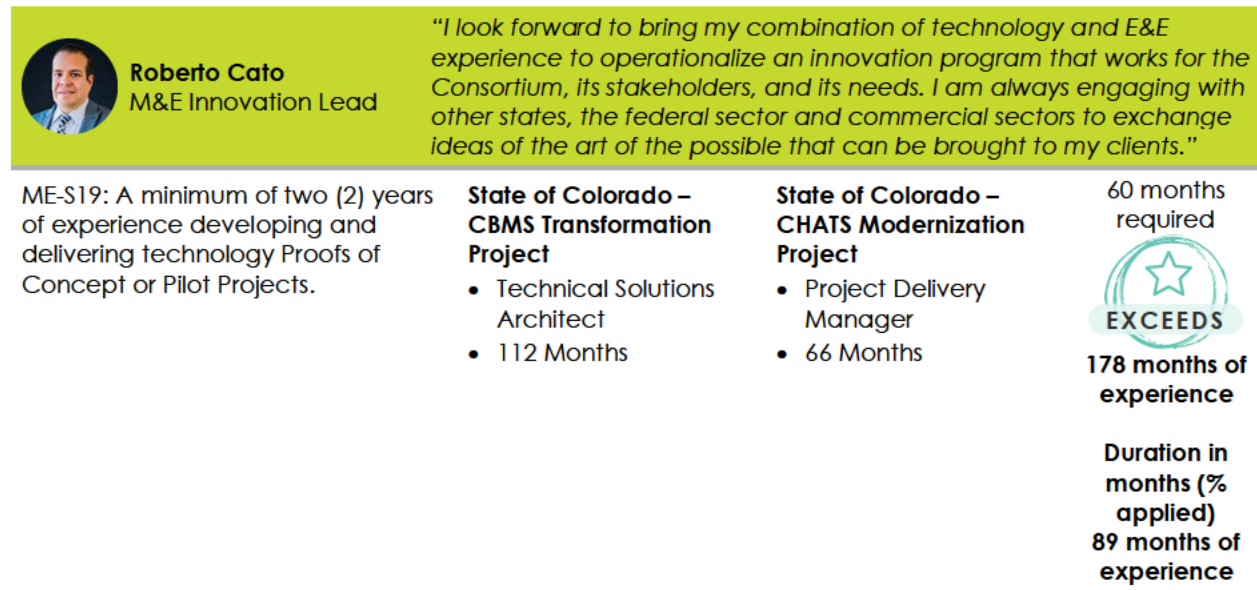
**Roberto Cato**  
M&E Innovation Lead

*"I look forward to bring my combination of technology and E&E experience to operationalize an innovation program that works for the Consortium, its stakeholders, and its needs. I am always engaging with other states, the federal sector and commercial sectors to exchange ideas of the art of the possible that can be brought to my clients."*

#### Why is Roberto right for this role?

Roberto exceeds skills, qualifications, and 5-year minimum requirement for the project position with over 20 years of leadership and innovation experience working across several projects for large and complex E&E IT systems in Colorado, Michigan, and Texas. Over the last 12 years, Roberto has served the State of Colorado in advising and implementing cutting edge innovations that improve scalability, streamline applications, and improve access via integrated and modernized systems. He also is on the innovation leadership team for our Customer & Marketing offering who works with different alliance partners to establish proofs of concept.


RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S17: A minimum of five (5) years of experience working in a leadership capacity on a health and human or health care Project involving large and complex IT systems.	<b>State of Colorado – CBMS Transformation Project</b> <ul style="list-style-type: none"> <li>Technical Solutions Architect</li> <li>112 Months</li> </ul>	<b>State of Colorado – CHATS Modernization Project</b> <ul style="list-style-type: none"> <li>Project Delivery Manager</li> <li>66 Months</li> </ul>	60 months required  <b>EXCEEDS</b> 178 months of experience  Duration in months (% applied) <b>89 months of experience</b>
ME-S18: A minimum of five (5) years of experience working in a technical capacity responsible for evaluating technology improvements and innovations.	<b>State of Colorado – CBMS Transformation Project</b> <ul style="list-style-type: none"> <li>Technical Solutions Architect</li> <li>112 Months</li> </ul>	<b>State of Colorado – CHATS Modernization Project</b> <ul style="list-style-type: none"> <li>Project Delivery Manager</li> <li>66 Months</li> </ul>	60 months required  <b>EXCEEDS</b> 178 months of experience  Duration in months (% applied) <b>89 months of experience</b>





**Figure 3-13. M&E Innovation Lead.**

## 3.1.2.6 M&E Enterprise Architect

### Attachment B10 Requirements: ME-S20-S23





**Lori Olson**  
M&E Enterprise Architect

*"As I've done with multiple clients, I look forward to use the right set of technologies and design patterns to deliver and evolve CalSAWS that fully takes advantage of AWS and cloud native computing. Leaning on experience from CalHEERS I know where the pitfalls may be and have planned to avoid them."*

#### Why is Lori right for this role?

Lori exceeds skills, qualifications, and requirements for the project position with **9 years and 5 months within the past ten (10) years of experience across four projects**. She is responsible for the development and implementation of the architecture modernization roadmap at CalHEERS that has the closest architecture to CalSAWS. As part of this she also led the efforts associated with moving the Oracle database to our same proposed open-source database, Aurora PostgreSQL, hosted on AWS. She has navigated the evolution to understand where challenges may be encountered and as accounted for that in our approach to evolving the CalSAWS application and architecture. Overall, Lori possesses **25 years** as an Enterprise Architect on projects involving large and complex IT systems including HHS systems.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S20: A minimum of five (5) years of experience within the past ten (10) years as an Enterprise Architect on Projects involving large and complex IT systems.	<b>Internal Revenue Service – IRS Web Apps Project</b> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>27 Months</li> </ul> <b>State of Washington – Health Benefit Exchange</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>50 Months</li> </ul> <b>U.S. Dept of Education Office of FSA – Migrant Student Information Exchange Project</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>27 Months</li> </ul>	<b>State of California Department of Healthcare Services – CalHEERS Project</b> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>28 Months</li> </ul> <b>Internal Revenue Service – Information Returns Processing Project</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>100 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p>232 months of experience</p> <p>Duration in months (% applied) <b>69.7 months of experience</b></p>
ME-S21: A minimum of five (5) years of experience within the past ten (10) years in architecting and building high performance systems and/or in architecting and building enterprise-scale, distributed systems on Projects involving large and complex IT systems; a portion of this experience must have been with human services systems and programs.	<b>Internal Revenue Service – IRS Web Apps Project</b> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>27 Months</li> </ul> <b>State of Washington – Health Benefit Exchange</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>50 Months</li> </ul> <b>U.S. Dept of Education Office of FSA – Migrant Student Information Exchange Project</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>27 Months</li> </ul>	<b>State of California Department of Healthcare Services – CalHEERS Project</b> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>28 Months</li> </ul> <b>Internal Revenue Service – Information Returns Processing Project</b> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>100 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p>232 months of experience</p> <p>Duration in months (% applied) <b>69.7 months of experience</b></p>




**Lori Olson**  
M&E Enterprise Architect

P  
PIONEER

D  
DRIVER

*"As I've done with multiple clients, I look forward to use the right set of technologies and design patterns to deliver and evolve CalSAWS that fully takes advantage of AWS and cloud native computing. Leaning on experience from CalHEERS I know where the pitfalls may be and have planned to avoid them."*

<p>ME-S22: A minimum of five (5) years of experience within the past ten (10) years of advanced technical expertise in at least five (5) of the following technologies and technical/architecture areas:</p> <ol style="list-style-type: none"> <li>1. Web and Application Servers</li> <li>2. Cloud</li> <li>3. Customer Relationship Management (CRM)</li> <li>4. Customized Off-the-shelf Software (COTS)</li> <li>5. Service Oriented Architecture (SOA)</li> <li>6. Modeling skills/Unified Modeling Language (UML)</li> <li>7. SharePoint, Data Architecture</li> <li>8. Data Warehousing</li> <li>9. Security/Identity Management</li> <li>10. Mobile</li> <li>11. Desktop/Client Server</li> <li>12. Network solutions</li> </ol>	<p><b>Internal Revenue Service – State of California IRS Web Apps Project</b></p> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>27 Months</li> </ul> <p><b>State of Washington – Health Benefit Exchange</b></p> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>50 Months</li> </ul> <p><b>U.S. Dept of Education Office of FSA – Migrant Student Information Exchange Project</b></p> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>27 Months</li> </ul>	<p><b>State of California Department of Healthcare Services – CalHEERS Project</b></p> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>28 Months</li> </ul> <p><b>Internal Revenue Service – Information Returns Processing Project</b></p> <ul style="list-style-type: none"> <li>Enterprise Architect</li> <li>100 Months</li> </ul>
		<p>60 months required</p> <div style="text-align: center;">  <p><b>EXCEEDS</b></p> </div> <p><b>232 months of experience</b></p> <p>Duration in months (% applied) <b>69.7 months of experience</b></p>

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<p>ME-S23: Hold and maintain for the duration of the contract a current certification: AWS Certified Solutions Architect.</p>	<p><b>AWS Solution Architecture Associate 06/05/2021 – 06/05/2024</b></p>	 <p><b>MEETS</b></p>
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**Figure 3-14. M&E Enterprise Architect.**

## 3.1.2.7 M&E Technical Manager

### Attachment B10 Requirements: ME-S24-S27

#### Jerald (Jerry) Nielson

M&E Technical Manager






*"My goal at CalSAWS: Technology made simple, that is highly stable, and responsive to the Consortium's needs, just like on BenefitsCal. I look forward to continuing to modernize the SAWS technology platform and ultimately transforming service delivery."*

#### Why is Jerry right for this role?

Jerry exceeds skills, qualifications, and requirements for the project position with more than **9 years and 10 months of experience** within the past 10 years. In addition, Jerry has more than **15 years of experience** in Health and Human Services. Jerry has been working on SAWS projects starting with C-IV, then onto LRS and now with BenefitsCal. He currently leads efforts with CalSAWS and the EBT vendor (FIS) as integration partners for exchanging information with BenefitsCal. Jerry also drives BenefitsCal performance testing and leads presentations to the architecture review board and facilitates the processes around FinOps. He has experience working in other states as well in Alaska, Kansas and Kentucky. Bringing multi-state experience to California brings fresh perspectives around managing and modernizing CalSAWS technology. In Jerry's current role with BenefitsCal he led the effort to implement a serverless, cloud native portal that is reflective of the future state where the Consortium would like to move.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S24: A minimum of five (5) years of experience within the past ten (10) years, managing a technical team of at least 20 members on a large and complex IT systems development Project.	<b>State of California – BenefitsCal</b> <ul style="list-style-type: none"> <li>Application Development Manager</li> <li>28 Months</li> </ul> <b>California Department of Conservation – WellSTAR</b> <ul style="list-style-type: none"> <li>IT Operations Manager</li> <li>29 Months</li> </ul>	<b>Los Angeles County Department of Public Social Services – LEADER Replacement System Project</b> <ul style="list-style-type: none"> <li>Technology Delivery Manager</li> <li>45 Months</li> </ul> <b>State of California Department of Consumer Affairs – Cal-VIS Project</b> <ul style="list-style-type: none"> <li>IT Operations Manager</li> <li>14 Months</li> </ul>	<b>60 months required</b>  <b>EXCEEDS</b> <b>116 months of experience</b>
ME-S25: A minimum of five (5) years of experience within the past ten (10) years, managing the system development life cycle (SDLC) on maintenance and enhancement Projects that involved large and complex IT systems.	<b>State of California – BenefitsCal</b> <ul style="list-style-type: none"> <li>Application Development Manager</li> <li>28 Months</li> </ul> <b>California Department of Conservation – WellSTAR</b> <ul style="list-style-type: none"> <li>IT Operations Manager</li> <li>29 Months</li> </ul>	<b>Los Angeles County Department of Public Social Services – LEADER Replacement System Project</b> <ul style="list-style-type: none"> <li>Technology Delivery Manager</li> <li>45 Months</li> </ul> <b>State of California Department of Consumer Affairs – Cal-VIS Project</b> <ul style="list-style-type: none"> <li>IT Operations Manager</li> <li>14 Months</li> </ul>	<b>60 months required</b>  <b>EXCEEDS</b> <b>116 months of experience</b>



<div> <div>  <p><b>Jerald (Jerry) Nielson</b> M&amp;E Technical Manager</p> <div> <div>D DRIVER</div> <div>P PIONEER</div> </div> </div> <div> <p><i>"My goal at CalSAWS: Technology made simple, that is highly stable, and responsive to the Consortium's needs, just like on BenefitsCal. I look forward to continuing to modernize the SAWS technology platform and ultimately transforming service delivery."</i></p> </div> </div>			
<p>ME-S26: A minimum of five (5) years of experience within the past ten (10) years in the development, implementation, and management of information technology systems, including Oracle technologies, cloud architectures, business systems, server technologies, and communication technologies.</p>	<p><b>State of California – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Application Development Manager</li> <li>• 28 Months</li> </ul> <p><b>California Department of Conservation – WellSTAR</b></p> <ul style="list-style-type: none"> <li>• IT Operations Manager</li> <li>• 29 Months</li> </ul>	<p><b>Los Angeles County Department of Public Social Services – LEADER Replacement System Project</b></p> <ul style="list-style-type: none"> <li>• Technology Delivery Manager</li> <li>• 45 Months</li> </ul> <p><b>State of California Department of Consumer Affairs – Cal-VIS Project</b></p> <ul style="list-style-type: none"> <li>• IT Operations Manager</li> <li>• 14 Months</li> </ul>	<p>60 months required</p> <div>  <p>EXCEEDS</p> </div> <p>116 months of experience</p>
<p>ME-S27: A minimum of one (1) year of experience within the past ten (10) years, on a large and complex IT System using Information Technology Infrastructure Library (ITIL) standards and framework.</p>	<p><b>State of California – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Application Development Manager</li> <li>• 28 Months</li> </ul> <p><b>California Department of Conservation – WellSTAR</b></p> <ul style="list-style-type: none"> <li>• IT Operations Manager</li> <li>• 29 Months</li> </ul>	<p><b>Los Angeles County Department of Public Social Services – LEADER Replacement System Project</b></p> <ul style="list-style-type: none"> <li>• Technology Delivery Manager</li> <li>• 45 Months</li> </ul> <p><b>State of California Department of Consumer Affairs – Cal-VIS Project</b></p> <ul style="list-style-type: none"> <li>• IT Operations Manager</li> <li>• 14 Months</li> </ul>	<p>12 months required</p> <div>  <p>EXCEEDS</p> </div> <p>116 months of experience</p>

**Figure 3-15. M&E Technical Manager.**

### 3.1.2.8 M&E Application Manager

#### Attachment B10 Requirements: ME-S28-S30




**Surranjan Kumar**  
M&E Application Manager









*"I look forward to applying my experience from multiple E&E projects, and the full Deloitte's E&E network, to design CalSAWS enhancements that use the latest design thinking to support Counties. I am excited to continue my SAWS journey with the Consortium and the Counties."*

#### Why is Surranjan right for this role?

Surranjan exceeds the 5-year requirement, with more than **22 years of experience**, as an application manager or project lead on large and complex IT system projects in HHS. He has been working with the Consortium for the last two years as a strategic advisor and jointly driving UAT with the Consortium. Surranjan also spent more than 5 years working on ISAWS as an application lead. He knows California. To complement his California experience, Surranjan served in roles leading application efforts in New Mexico, Oregon and Louisiana. He grew up as a developer with a strong foundational understanding technology. He worked closely with the BenefitsCal team as part of UAT to gauge usability by County workers who would become users of the system. Surranjan exceeds the Consortium's 5-year requirement with more than **5 years of experience** out of the last 10 managing SDLCs, including business and system requirement specification, design, development, testing, and implementation.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S28: A minimum of five (5) years of experience within the past ten (10) years, as the application manager or lead on Projects involving large and complex IT systems in a health and human services or health care services Project.	<b>State of Oregon</b> <b>Oregon Department of Human Services &amp; Oregon Health Authority – ONE System</b> <ul style="list-style-type: none"> <li>• Project &amp; Application Manager</li> <li>• 16 Months</li> </ul>	<b>State of Louisiana</b> <b>Department of Health &amp; Hospitals – E&amp;E Project</b> <ul style="list-style-type: none"> <li>• Application Manager</li> <li>• 20 Months</li> </ul> <b>State of New Mexico</b> <b>Human Services Department – ASPEN Project</b> <ul style="list-style-type: none"> <li>• Application Developer Manager</li> <li>• 24 Months</li> </ul>	<p>60 months required</p>  <p>60 months of experience</p>

<div>  <p><b>Surranjan Kumar</b> M&amp;E Application Manager</p> <div>   </div> </div> <p><i>"I look forward to applying my experience from multiple E&amp;E projects, and the full Deloitte's E&amp;E network, to design CalSAWS enhancements that use the latest design thinking to support Counties. I am excited to continue my SAWS journey with the Consortium and the Counties."</i></p>			
<p>ME-S29: A minimum of five (5) years of experience within the past ten (10) years, managing a SDLC, including business and system requirement specification, design, development, testing, and implementation, on Projects involving large and complex IT systems.</p>	<p><b>State of Oregon</b> <b>Oregon Department of Human Services &amp; Oregon Health Authority – ONE System</b></p> <ul style="list-style-type: none"> <li>• Project &amp; Application Manager</li> <li>• 51 Months</li> </ul>	<p><b>State of Louisiana</b> <b>Department of Health &amp; Hospitals – E&amp;E Project</b></p> <ul style="list-style-type: none"> <li>• Application Manager</li> <li>• 20 Months</li> </ul> <p><b>State of New Mexico</b> <b>Human Services Department – ASPEN Project</b></p> <ul style="list-style-type: none"> <li>• Application Development Manager</li> <li>• 24 Months</li> </ul>	<p>60 months required</p> <div>  <p>EXCEEDS</p> </div> <p>95 months of experience</p>
<p>ME-S30: A minimum of three (3) years of experience applying UCD processes and User Experience (UX) activities (such as usability reviews, studies, and testing) on IT Projects.</p>	<p><b>State of California</b> <b>SAWS Consortium for CalSAWS &amp; BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• UAT Manager &amp; Strategic Advisor</li> <li>• 24 Months</li> </ul> <p><b>State of Oregon</b> <b>Oregon Department of Human Services &amp; Oregon Health Authority – ONE System</b></p> <ul style="list-style-type: none"> <li>• Project &amp; Application Manager</li> <li>• 51 Months</li> </ul>	<p><b>State of Louisiana</b> <b>Department of Health &amp; Hospitals – E&amp;E Project</b></p> <ul style="list-style-type: none"> <li>• Application Manager</li> <li>• 20 Months</li> </ul> <p><b>State of New Mexico</b> <b>Human Services Department – ASPEN Project</b></p> <ul style="list-style-type: none"> <li>• Application Development Manager</li> <li>• 24 Months</li> </ul>	<p>36 months required</p> <div>  <p>EXCEEDS</p> </div> <p>119 months of experience</p>

**Figure 3-16. M&E Application Manager.**

### 3.1.2.9 M&E Security Manager

#### Attachment B10 Requirements: ME-S31-S36

**Debi Mohanty**

M&E Security Manager










*"Cyber threats continue to multiply for systems like CalSAWS. I'll manage the full capabilities of Deloitte to keep CalSAWS infrastructure and data safe from threats."*

#### Why is Debi right for this role?

Debi exceeds all skills, qualifications, and requirements for the project position. With over 22 years of experience in infrastructure security, he leverages his leadership and security skills in managing diverse security practitioners supporting healthcare eligibility/ enrollment systems, managing expectations with federal entities such as [REDACTED] and [REDACTED] along with maintaining current security compliance that will be required for CalSAWS. He also serves as a Security Advisor to the Deloitte BenefitsCal team conducting reviews and engaging in addressing challenges encountered with ForgeRock. Debi focuses on IT risk management and IAM design and implementation, information management, security policies and standards development, and IT security and User Provisioning, Privileged Access Management (PAM) projects. He is a thought leader in Deloitte's Identity and Access Management (IAM) practice, including leading the reference implementation of Deloitte's IAMMethods™ methodology, application factory modeling, identity metrics dashboards, and most recently on User Behavioral Analytics in Identity Management which helps provide identity insights into a comprehensive Insider Threat Management program.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S31: A minimum of three (3) years of experience as a Security Manager directly responsible for collaborating with application development teams, technical architects, and security policy experts to define and/or implement an integrated framework of solution security architecture.	<b>State of California – BenefitsCal</b> <ul style="list-style-type: none"> <li>• Security Advisor</li> <li>• 26 Months</li> </ul> <b>State of California – CalHEERS</b> <ul style="list-style-type: none"> <li>• Security Officer</li> <li>• 40 Months</li> </ul>	<b>University of Southern California – SecureUSC</b> <ul style="list-style-type: none"> <li>• Security Program Manager</li> <li>• 11 Months</li> </ul> <b>WA HBE – Washington Healthplanfinder Project</b> <ul style="list-style-type: none"> <li>• Security Lead</li> <li>• 26 Months</li> </ul>	36 months required  <b>EXCEEDS</b> 103 months of experience Duration in months (% applied) 77 months of experience
ME-S32: A minimum of three (3) years of lead experience within the past ten (10) years developing, implementing, improving, and monitoring industry standard Security strategies, solutions, and processes on Projects involving large and complex IT systems and AWS cloud environment.	<b>State of California – BenefitsCal</b> <ul style="list-style-type: none"> <li>• Security Advisor</li> <li>• 26 Months</li> </ul> <b>State of California – CalHEERS</b> <ul style="list-style-type: none"> <li>• Security Officer</li> <li>• 40 Months</li> </ul>	<b>University of Southern California – SecureUSC</b> <ul style="list-style-type: none"> <li>• Security Program Manager</li> <li>• 11 Months</li> </ul> <b>WA HBE – Washington Healthplanfinder Project</b> <ul style="list-style-type: none"> <li>• Security Lead</li> <li>• 26 Months</li> </ul>	36 months required  <b>EXCEEDS</b> 103 months of experience Duration in months (% applied) 77 months of experience

<div> <div>  <p><b>Debi Mohanty</b> M&amp;E Security Manager</p> </div> <div>   </div> <div> <p><i>"Cyber threats continue to multiply for systems like CalSAWS. I'll manage the full capabilities of Deloitte to keep CalSAWS infrastructure and data safe from threats."</i></p> </div> </div>			
<p>ME-S33: A minimum of three (3) years of experience within the past ten (10) years applying Information Security principles, methods, and techniques in the development of Project security Deliverables on Projects involving large and complex IT systems.</p>	<p><b>State of California – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Security Advisor</li> <li>• 26 Months</li> </ul> <p><b>State of California – CalHEERS</b></p> <ul style="list-style-type: none"> <li>• Security Officer</li> <li>• 40 Months</li> </ul>	<p><b>University of Southern California – SecureUSC</b></p> <ul style="list-style-type: none"> <li>• Security Program Manager</li> <li>• 11 Months</li> </ul> <p><b>WA HBE – Washington Healthplanfinder Project</b></p> <ul style="list-style-type: none"> <li>• Security Lead</li> <li>• 26 Months</li> </ul>	<p>36 months required</p>  <p><b>EXCEEDS</b></p> <p>103 months of experience</p> <p>Duration in months (% applied) 77 months of experience</p>
<p>ME-S34: A minimum of three (3) years of experience assessing system data sensitivity using security categorizations (e.g., FIPS Publication 199) to identify appropriate security controls to protect Personally Identifiable Information (PII), Protected Health Information (PHI), and/or Federal Tax Information (FTI) data.</p>	<p><b>State of California – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Security Advisor</li> <li>• 26 Months</li> </ul> <p><b>State of California – CalHEERS</b></p> <ul style="list-style-type: none"> <li>• Security Officer</li> <li>• 40 Months</li> </ul>	<p><b>University of Southern California – SecureUSC</b></p> <ul style="list-style-type: none"> <li>• Security Program Manager</li> <li>• 11 Months</li> </ul> <p><b>WA HBE – Washington Healthplanfinder Project</b></p> <ul style="list-style-type: none"> <li>• Security Lead</li> <li>• 26 Months</li> </ul>	<p>36 months required</p>  <p><b>EXCEEDS</b></p> <p>103 months of experience</p> <p>Duration in months (% applied) 77 months of experience</p>
<p>ME-S35: A minimum of three (3) years of experience with systems that comply with NIST 800-53 moderate baseline.</p>	<p><b>State of California – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Security Advisor</li> <li>• 26 Months</li> </ul> <p><b>State of California – CalHEERS</b></p> <ul style="list-style-type: none"> <li>• Security Officer</li> <li>• 40 Months</li> </ul>	<p><b>University of Southern California – SecureUSC</b></p> <ul style="list-style-type: none"> <li>• Security Program Manager</li> <li>• 11 Months</li> </ul> <p><b>WA HBE – Washington Healthplanfinder Project</b></p> <ul style="list-style-type: none"> <li>• Security Lead</li> <li>• 26 Months</li> </ul>	<p>36 months required</p>  <p><b>EXCEEDS</b></p> <p>103 months of experience</p> <p>Duration in months (% applied) 77 months of experience</p>
<p>ME-S36: Hold an (ISC)2® Certified Information Systems Security Professional (CISSP) certification, or ISACA Certified Information Security Manager (CISM) and maintain for the duration of the contract.</p>	<p>Certified Information Systems Security Professional (CISSP) Certified</p>		 <p><b>MEETS</b></p>

**Figure 3-17. M&E Security Manager.**



### 3.1.2.10 M&E Testing Manager

#### Attachment B10 Requirements: ME-S37-S41

##### Mufaddal Tinmaker

M&E Testing Manager









*"I will work closely with my Consortium counterpart to implement quality assurance processes that are cost effective, repeatable, automated, and transparent, delivering a high performing CalSAWS solution that is designed for end user needs."*

#### Why is Mufaddal right for this role?

Mufaddal exceeds all skills, qualifications, and requirements for the project position. Mufaddal has been serving as the Testing Manager for BenefitsCal since the project's inception in 2020. He has gained knowledge of the CalSAWS system, integration approaches, challenges with test data management and data refreshes and batch as part of the effort. He has spearheaded the efforts for system, integration, UAT and regression including overseeing the development of an automated suite to confirm no regression issues, ADA compliance and language translation validation. As a result of Mufaddal's focus on quality BenefitsCal has had a low defect rate in production. Prior to BenefitsCal he led testing for North Dakota's statewide E&E implementation and into M&E. He is a fierce driver of infusing quality and continuous improvement into everything he does. Overall, Mufaddal possesses **13 years of experience** working with IT systems, stakeholders, and contractors to oversee M&E testing processes.


RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S37: A minimum of five (5) years of experience within the past ten (10) years as Test Manager or Lead on Projects involving large and complex IT systems in a health and human services or health care services Project.	<b>State of California CalSAWS Consortium – BenefitsCal</b> <ul style="list-style-type: none"> <li>• Test Manager</li> <li>• 26 Months</li> </ul>	<b>State of North Dakota Department of Health &amp; Human Services – SPACES Project</b> <ul style="list-style-type: none"> <li>• Testing Lead &amp; QA Release Manager</li> <li>• 65 Months</li> </ul>	60 months required  <b>EXCEEDS</b> <b>91 months of experience</b>
ME-S38: A minimum of five (5) years of experience planning, preparing for, and executing system test, UAT, and/or regression tests in compliance with a recognized standard, such as IEEE or ISO.	<b>State of California CalSAWS Consortium – BenefitsCal</b> <ul style="list-style-type: none"> <li>• Test Manager</li> <li>• 26 Months</li> <li>• [REDACTED]</li> <li>• Senior Software Test Engineer</li> <li>• 43 Months</li> </ul>	<b>State of North Dakota Department of Health &amp; Human Services – SPACES Project</b> <ul style="list-style-type: none"> <li>• Testing Lead &amp; QA Release Manager</li> <li>• 65 Months</li> <li>• [REDACTED]</li> <li>• Software Tester</li> <li>• 25 Months</li> </ul>	60 months required  <b>EXCEEDS</b> <b>159 months of experience</b>

<p><b>Mufaddal Tinmaker</b> M&amp;E Testing Manager</p>    <p><i>"I will work closely with my Consortium counterpart to implement quality assurance processes that are cost effective, repeatable, automated, and transparent, delivering a high performing CalSAWS solution that is designed for end user needs."</i></p>			
<p>ME-S39: A minimum of five (5) years of experience with testing JAVA web-based applications, Software interaction with Oracle databases, web services, and/or cloud services.</p>	<p><b>State of California CalSAWS Consortium – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Test Manager</li> <li>• 26 Months</li> <li>• [REDACTED]</li> <li>• Senior Software Test Engineer</li> <li>• 43 Months</li> </ul>	<p><b>State of North Dakota Department of Health &amp; Human Services – SPACES Project</b></p> <ul style="list-style-type: none"> <li>• Testing Lead &amp; QA Release Manager</li> <li>• 65 Months</li> <li>• [REDACTED]</li> <li>• Software Tester</li> <li>• 25 Months</li> </ul>	<p>60 months required</p>  <p><b>EXCEEDS</b></p> <p><b>159 months of experience</b></p>
<p>ME-S40: A minimum of three (3) years of experience overseeing or testing applications with multiple stakeholders/customers with varied business priorities and varying levels of experience with automation systems.</p>	<p><b>State of California CalSAWS Consortium – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Test Manager</li> <li>• 26 Months</li> <li>• [REDACTED]</li> <li>• Senior Software Test Engineer</li> <li>• 43 Months</li> </ul>	<p><b>State of North Dakota Department of Health &amp; Human Services – SPACES Project</b></p> <ul style="list-style-type: none"> <li>• Testing Lead &amp; QA Release Manager</li> <li>• 65 Months</li> </ul>	<p>36 months required</p>  <p><b>EXCEEDS</b></p> <p><b>134 months of experience</b></p>
<p>ME-S41: Experience testing in waterfall, agile and iterative SDLC models and mixed models (i.e., multiple SDLCs occurring concurrently).</p>	<p><b>State of California CalSAWS Consortium – BenefitsCal</b></p> <ul style="list-style-type: none"> <li>• Test Manager</li> <li>• 26 Months</li> <li>• [REDACTED]</li> <li>• Senior Software Test Engineer</li> <li>• 43 Months</li> </ul>	<p><b>State of North Dakota Department of Health &amp; Human Services – SPACES Project</b></p> <ul style="list-style-type: none"> <li>• Testing Lead &amp; QA Release Manager</li> <li>• 65 Months</li> <li>• [REDACTED]</li> <li>• Software Tester</li> <li>• 25 Months</li> </ul>	 <p><b>MEETS</b></p>



**Figure 3-18. M&E Testing Manager.**

## 3.1.2.11 M&E Release Manager

### Attachment B10 Requirements: ME-S42-S43





**Kimberle (Kim) Buchter**  
M&E Release Manager

*"I understand the importance of coordinating and communicating at CalSAWS. I'll work with you to define clear processes that provide transparency to both release prioritization and management."*

#### Why is Kim right for this role?

Kim exceeds skills, qualifications, and requirements for the project position with 9 years and 7 months within the past ten (10) years of experience across two projects. Overall, Kim possesses over 13 years of experience in the state government sector delivering complex and innovative solutions working with stakeholders and staff to coordinate and modernize large and complex systems.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S42: A minimum of five (5) years of experience within the past ten (10) years as the release manager or lead on Projects involving large and complex IT systems in a health and human services or health care services Project.	<b>Louisiana Department of Children and Family Services - Louisiana Integrated Technology for Eligibility (LITE)</b> <ul style="list-style-type: none"> <li>Release and Functional Track Manager</li> <li>47 Months</li> </ul> <b>Louisiana Department of Health - Medicaid Eligibility Determination System Project (LaMEDS)</b> <ul style="list-style-type: none"> <li>Track Lead/Deputy Application Manager</li> <li>84 Months</li> </ul>	<b>Washington Health Benefit Exchange - Washington Healthplanfinder (WA HPF)</b> <ul style="list-style-type: none"> <li>Functional Lead</li> <li>12 Months</li> </ul>	60 months required  <b>EXCEEDS</b> 143 months of experience  Duration in months (% applied) <b>96 months of experience</b>
ME-S43: A minimum of five (5) years of experience within the past ten (10) years, on Projects involving large and complex IT systems, where the Project scope included managing, planning, scheduling, and controlling Software builds through various stages and environments; including testing and deploying Software releases.	<b>Louisiana Department of Children and Family Services - LITE</b> <ul style="list-style-type: none"> <li>Release and Functional Track Manager</li> <li>47 Months</li> </ul> <b>Louisiana Department of Health - LaMEDS</b> <ul style="list-style-type: none"> <li>Track Lead/Deputy Application Manager</li> <li>84 Months</li> </ul>	<b>Washington Health Benefit Exchange - WA HPF</b> <ul style="list-style-type: none"> <li>Functional Lead</li> <li>12 Months</li> </ul>	60 months required  <b>EXCEEDS</b> 143 months of experience  Duration in months (% applied) <b>96 months of experience</b>

**Figure 3-19. M&E Release Manager.**

## 3.1.2.12 M&E Project Scheduler

### Attachment B10 Requirements: ME-S44-S46

#### Robert Daffin

M&E Project Scheduler








*"The project schedule is critical for a project as large as CalSAWS. I look forward to not only using my MS Project skills to support you, but my approach to communication and coordination."*

#### Why is Robert right for this role?

Robert exceeds the skills, qualifications, and requirements for the project position with 8 years of experience using Microsoft Project to plan, develop, maintain, and report on highly complex integrated master schedules and Work Plans for a large and complex IT System Project. He utilizes Project management best practice techniques and risk mitigation strategies as he incorporates various levels of progress in customized reports with tools such as Gantt, PERT, and milestone charting. Overall, Robert has over 10 years of experience working in project management on Deloitte public sector software development projects, including eight years of managing project schedules. He has planned, developed, and maintained project schedules for large scale technology projects including E&E systems and integrated eligibility systems across 4 states. Robert provided support to the CalWIN ISS team in building out their integrated project schedule, incorporating County, Consortium and CalSAWS contractor activities associated with the CalWIN migration.

RFP Requirement	Relevant Project Experience		Requirement Met?
ME-S44: At minimum of three (3) years of experience using Microsoft Project 2013 or later versions to plan, develop, maintain, and report on highly complex integrated master schedules and Work Plans for a large and complex IT System Project.	<b>Tennessee Division of Healthcare Finance and Administration – TEDS</b> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 12 Months</li> </ul>	<b>Georgia Department of Human Services – GA IES</b> <ul style="list-style-type: none"> <li>• QA and Work Plan Senior Analyst/PMO</li> <li>• 34 Months</li> </ul> <b>Florida Department of Children and Families - FL MES</b> <ul style="list-style-type: none"> <li>• QA and Work Plan Analyst/PMO</li> <li>• 24 Months</li> </ul>	24 months required  <b>EXCEEDS</b> 106 months of experience
	<b>Arkansas Department of Human Services – ARIES</b> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 36 Months</li> </ul>		


<div>  <div> <b>Robert Daffin</b>  M&amp;E Project Scheduler </div> <div>   </div> </div> <p><i>"The project schedule is critical for a project as large as CalSAWS. I look forward to not only using my MS Project skills to support you, but my approach to communication and coordination."</i></p>				
<p>ME-S45: A minimum of two (2) years of experience managing highly complex, integrated master schedules and Work Plans using industry best practices and standards (e.g., Institute of Electrical and Electronic Engineers, Project Management Body of Knowledge, and/or Software Engineering Institute).</p>	<p><b>Tennessee Division of Healthcare Finance and Administration – TEDS</b></p> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 12 Months</li> </ul> <p><b>Arkansas Department of Human Services – ARIES</b></p> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 36 Months</li> </ul>	<p><b>Georgia Department of Human Services – GA IES</b></p> <ul style="list-style-type: none"> <li>• QA and Work Plan Senior Analyst/PMO</li> <li>• 34 Months</li> </ul> <p><b>Florida Department of Children and Families - FL MES</b></p> <ul style="list-style-type: none"> <li>• QA and Work Plan Analyst/PMO</li> <li>• 24 Months</li> </ul>	<p>24 months required</p> <div>  <p><b>EXCEEDS</b></p> </div> <p><b>106 months of experience</b></p>	
<p>ME-S46: A minimum of two (2) years of experience with integrated and highly detailed Work Plans, utilizing Project management best practice techniques and one or more of the following technology tools to incorporate different levels of progress in customized reports: Gantt, PERT, or milestone charts.</p>	<p><b>Tennessee Division of Healthcare Finance and Administration – TEDS</b></p> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 12 Months</li> </ul> <p><b>Arkansas Department of Human Services – ARIES</b></p> <ul style="list-style-type: none"> <li>• Work Plan and Schedule Lead</li> <li>• 36 Months</li> </ul>	<p><b>Georgia Department of Human Services – GA IES</b></p> <ul style="list-style-type: none"> <li>• QA and Work Plan Senior Analyst/PMO</li> <li>• 34 Months</li> </ul> <p><b>Florida Department of Children and Families - FL MES</b></p> <ul style="list-style-type: none"> <li>• QA and Work Plan Analyst/PMO</li> <li>• 24 Months</li> </ul>	<p>24 months required</p> <div>  <p><b>EXCEEDS</b></p> </div> <p><b>106 months of experience</b></p>	

**Figure 3-20. M&E Project Scheduler.**



### 3.1.3 Additional Project Leadership and Advisors

Deloitte brings additional leadership and advisors to the CalSAWS M&E Services contract to supplement, support, and round-out the M&E key staff team. These roles include Deloitte practitioners with strong backgrounds in HHS, national leadership, and deep experience in their key skill areas. Our Deloitte advisors add significant value and provide vital skills to enable project success, lower the overall risk profile of the project, and support CalSAWS and the M&E Services contract. Figure 3-21 through Figure 3-24 outlines our project leadership and advisors identified for project success.



CalSAWS Advisor  
**Rachel Frey**


P  
PIONEER

I  
INTEGRATOR

**Why is Rachel right for this role?**

Rachel brings over 25 years of experience in working with commercial, State, and local HHS Services agencies. She serves on the national HHS leadership team with responsibilities, holding past positions including leading Deloitte's State and Local HHS Program Integrity Offering and HHS Analytics. Rachel has led efforts for eight E&E technology and operational redesign efforts, including California, Nevada, Louisiana, the District of Columbia, Pennsylvania, Wisconsin, New Mexico, and Indiana. Rachel has been serving as the Project Executive for BenefitsCal and CalWIN ISS since 2020 and is the Consulting Business Unit Leader for E&E in California. She started her career supporting the implementation of Los Angeles LEADER and moved on to leading the application development for WDTIP and later on to ISAWS.

**Figure 3-21. Project Leadership and Advisors.**




Deputy Project Manager  
**Duncan Gilliam**

D  
DRIVER



P  
PIONEER

**Why is Duncan right for this role?**

Duncan is a proven leader at CalSAWS who has earned the trust of the CalSAWS Executive Director, Section Directors, Regional Managers, and County Leadership. Through his time as Project Manager of the CalWIN ISS project, he was able to establish strong governance and an operating model to manage across the CalSAWS enterprise, and bring together a complex group of team members, including multiple vendors, Consortium workstreams and Counties. His focus on delivering increased value to CalWIN counties is evident, through efforts such as Configuration and Process Simulation. Duncan saw the need for these important efforts and put the structure in place to provide Counties with this additional support to prepare them for CalSAWS migration. Both Configuration and Process Simulation have been universally lauded by Counties and even noted as "the best part of my experience with CalSAWS" by multiple County leaders. At this critical juncture, CalSAWS needs proven leaders, that can step in and




Deputy Project Manager  
**Duncan Gilliam**


**Why is Duncan right for this role?**

deliver results from Day-1. Based on his past track record, and continued commitment to the Consortium and Counties, Duncan is an ideal candidate as Deputy Project Manager.

**Figure 3-22. Project Leadership and Advisors.**




Innovation Advisor  
**Phong Huynh**





**Why is Phong right for this role?**

Phong, a Principal at Deloitte Consulting, brings 21 years of experience working in transforming operations. He focuses on streaming and automating processes to be paperless and providing customers with self-service solutions. Phong has successfully delivered large, complex technology implementations for multiple enterprise clients with multiple stakeholder groups. He has a full understanding of best practices and methodologies for the entire Software Development Life Cycle (SDLC). Phong led Ecosystems and Alliances for the Customer & Marketing offering bringing together our alliance relationships to develop new proofs of concept for government clients.

**Figure 3-23. Project Leadership and Advisors.**



Stakeholder Advisor  
**Frank Mecca**

**Why is Frank right for this role?**

Frank Mecca served as CWDA's Executive Director from October 1991 - December 2020. During this time, he helped establish CWDA as a leading advocacy and policy organization in the field of public human services. Under Frank's leadership, the association was instrumental in the development of significant human services programs and policies, including helping shape the CalWORKs program, creating the Adult Protective Services program, and advocating for significant child welfare reform efforts such as extending foster care support to youth after age 18. Frank was Vice Chairman and a board member of the California Budget & Policy Center, as well as a member of the California Child Welfare Council. He is a former president of the National Association of County Human Services Administrators. Frank brings to our team a view from the Counties and experience navigating the complex SAWS stakeholder environment.

**Figure 3-24. Project Leadership and Advisors.**

## 3.2 Staffing Experience Details

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**RFP Reference: 6.3.8.5.2 Staffing Experience Details**

The Bidder shall provide Staff résumés and qualifications for all Staff in accordance with the format prescribed in **Attachment B10 – Staff Resumes and Qualifications**.

The Bidder shall provide two (2) Individual Reference Checks for all Staff in accordance with the format prescribed in **Attachment B11 – Staff Reference Form**.

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### 3.2.1 Staff Resumes and Qualifications

The completed forms, in the required parts 1, 2, and 3 format, have been provided separately as “Attachment B10 – M&E Staff Resumes and Qualifications” within Section 6 – Business Proposal Attachments.

### 3.2.2 M&E Key Staff Client References

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**RFP Reference: 5.3.2.2.1 M&E Key Staff Client References**

The purpose of the Staff reference requirements is to provide the Consortium with the ability to assess Key Staff experience in supplying similar or relevant services to those identified in this solicitation. Key Staff Client References contained in this section must be met and documented according to Section 6 - Proposal Structure and Submission. The Consortium may contact references listed to verify the information provided by the Bidder. Any conflicting information may result in the Proposal being deemed nonresponsive.

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The completed and signed forms for the two individual reference checks for all key staff, in the required format, have been provided separately as “Attachment B11 – M&E Staff Reference Forms” within Section 6 – Business Proposal Attachments.