

Approach to Imaging Services

Section 5

RFP Reference: 6.3.9.2 Section 5 – Approach to Imaging Services

Bidders will provide a narrative Approach to Imaging Services with its Proposal. The Approach will inform the Consortium of the Bidder's overall plan to deliver Imaging Services from Transition-In to maintaining, operating, and enhancing Imaging Services. Bidders are advised to consider, in the development of this narrative, the following Section 15 – Optional Imaging Services, Imaging Deliverable and Imaging SLAs. This narrative will not be scored and may not exceed 10 pages.

The implementation of the current CalSAWS imaging solution has come with its challenges. In CalSAWS production today, just under 50% of all documents submitted are done through BenefitsCal yet the current imaging architecture cannot support running BenefitsCal submitted documents through Optical Character Recognition (OCR) capabilities without having performance issues. This was one of the objectives to reduce County workload that has not been realized. Documents are also not consistently delivered timely for workers to view creating challenges when a worker is in front of a Customer trying to serve them. Additionally, the current cost of the imaging software is higher than our experience in any other state across the US. Through renewed focus within these areas, the Consortium can expedite case processing times, create efficiencies for County workers, and lower overall imaging costs. Our approach prioritizes business continuity and County buy-in using a 3-phase, 12-month project lifecycle in which we stabilize, optimize, and ultimately, set the conditions for modernization of the CalSAWS imaging platform.

One of the most common reasons for a Customer being denied assistance is not providing verification documents timely. The BenefitsCal team has worked diligently with Customers to understand their historical challenges to make the process easier—with more than 14M documents uploaded across the current 42 CalSAWS production counties.

Helping the Consortium

color
outside
the lines



SECTION HIGHLIGHTS

- User-focused discovery sessions that **identify real-world insights** and establish “north star” priorities.
- Tangible **short-term system improvements** that do not require wholesale replacement.
- More than **200 enterprise content management (ECM)-focused engagements** within the past 10 years alone.
- Comprehensive **AI/ML software enhancements** that are calibrated for a **cloud-centric architecture**.
- Detailed **future-state modernization** roadmap combining **upgraded technology** within a **cost-conscious** framework.

Where challenges continue to exist in their journey is documentation that excepts out and needs to be handled manually, processes tied to individuals not being marked as in the home that prevent documents from being submitted, and the timeliness of document delivery to a worker. The routing of documents is tightly integrated with how workload and tasks are ultimately managed. As such the modernization of the task management module cannot be done in isolation from any enhancements to the imaging solution as they go hand in hand.

Deloitte's phased method for modernizing imaging services is pursued incrementally with careful emphasis on preventing service disruptions at each stage of realization. While the RFP allowed for vendors to propose a third party tool to replace the existing Hyland imaging solution, our solution-agnostic approach is positioned through the lens of stakeholder insights and actionable improvements that are fully tested, rather than proposing a rigid "wholesale" replacement strategy that relies on assumptions that need to be confirmed based on needs for County business operations (e.g., Los Angeles completing interviews right after application submission and requiring swift access to application/case documentation), system performance as it is currently unclear as to the solution's ability to scale and the overall licensing cost.

Considerations for Your Success

Our approach reflects a combination of proven methods, subject matter expertise, and strategic visioning that directly supports the Consortium's County-focused business priorities. We empower the voices of core CalSAWS users and provide the time necessary to scope, assess, and articulate recommendations. This, in turn, transforms the CalSAWS capture solution and document management system. We used the considerations Table 5-1 below in formulating this response.

Consideration	Impact to Our Approach
Elevate the Counties experience with imaging and integration with CalSAWS processes.	We avoid "one size fits all" approaches to improving and upgrading services while incorporating stakeholder insights from across the CalSAWS footprint.
Reduce workload impacts to Counties due to system performance issues.	Given the underutilized Hyland solution, due to current performance issues, we will emphasize prioritizing changes that optimize the channels where customers submit documentation.
Maintain successful, stable daily operations while evolving the imaging solution to reduce cost and provide more and better features.	We gradually and systematically test, simulate, and validate new user tools and program updates before statewide rollouts to confirm adherence with operational demands and implementation criteria.
Evaluate degree of change to the Counties.	The Counties have been through a recent change to Hyland. Continuously changing solutions also has an impact on Counties' productivity. Our approach includes evaluating the degree of change to the Counties and the impact to their delivery efforts.
Provide measurable, fact-based rationale for imaging priorities combined with qualitative feedback from	We incorporate advanced analytics and reporting tools into the decision-making process. This includes making mission-critical data available "on-demand" to inform issue mitigation, resource allocation, and prioritization of support systems. Our team will

Consideration	Impact to Our Approach
users through human centered design efforts.	perform onsite and remote reviews of Counties experience with imaging to address specific pain points.
Balance short-term objectives and long-term strategies when determining core activities.	We utilize a phased approach to stabilize, optimize, and modernize to deliver tangible short-term results, while simultaneously setting conditions for permanent transformation into upgraded systems and solutions.
Leverage AI/ML to increase imaging program efficiency and streamline document routing processes.	We leverage AI/ML tools, and models built in other states for document classification, that drive processing efficiency and lower processing times.
Expand cloud-based technologies to align with Consortium's strategic vision and reduce cost of ownership for document management services.	We consider replacement of existing software within the future-state modernization roadmap to achieve improved performance levels and lower-priced cost commitments that drive value for CalSAWS.

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

How the Remainder of this Section is Organized

5.1 Our Imaging Experience

5.2 Imaging Approach

- 5.2.1 Stabilization Phase (3 Months)
- 5.2.2 Optimization Phase (6 Months)
- 5.2.3 Modernization Phase (Ongoing 3 Month Sprints)

5.3 Staffing and Resource Allocation

5.4 Strategic Benefits Summary



5.1 Our Imaging Experience

The CalSAWS Consortium benefits from a superior imaging solution, stronger operational performance, and lower risk delivery with Deloitte's domain expertise and expansive knowledge of content management systems, including Hyland. We are at the cutting edge of technology innovation, AI, and cloud-based architecture, as evidenced by the impacts to our network of large government clients and Fortune 500 companies. These diverse capabilities and areas of differentiation enable us to offer an actionable, fully comprehensive imaging approach that places CalSAWS success at the forefront of our collaboration, as demonstrated in Figure 5-1.



Figure 5-1. Deloitte Differentiators.

Expert Talent: Within Deloitte, imaging services are positioned within our ECM practice. This practice is equipped with hundreds of personnel who possess expertise in industry-leading ECM solutions such as AWS, Box, Hyland, Google, Hyperscience, ABBYY, Parascript, OpenText. They have delivered more than 200 ECM-focused engagements within the past 10 years alone. This has enabled us to forge a distinguished record for delivering imaging services, particularly state and federal governments. We routinely help our clients consolidate their imaging operations within the cloud to drive down costs and modernize system capabilities. The market has evolved dramatically in the last 5 years with new entrants in the market that offer more advanced features. Our team is continuously kept up to speed with the latest in order to incorporate the latest available solutions.

Key Partnerships: Our firm offers a formal alliance with large-scale software providers such as Hyland, the company that owns and operates Perceptive and Brainware technologies. We have Hyland practitioners who understand how to maintain, operate, and optimize their products. Additionally, our Hyland alliance provides us with key vendor contacts who support our ECM engagements. As a multi-year platinum sponsor of Hyland's annual *CommunityLive* conference, we have forged deep relationships with Hyland's business leaders which enables us to operate with candor and open-mindedness on behalf of mutual clients. Beyond your current ECM SaaS vendor, Deloitte has relationships with AWS, Box, Google, Hyperscience, ABBYY, Parascript and Opentext. Our Michigan and Oregon E&E solutions are in the process of implementing Google for document classification, in Colorado we implemented Hyperscience to support iOCR for periodic reporting forms, at BenefitsCal we used AWS Textract to determine if changes were reported for SAR7s. All of these required partnerships with technology vendors to build out POCs.

Shared Values: It is crucially important to provide reliable, high-quality digital services in support of California's most vulnerable. An undertaking of this significance requires an experienced, dependable technology vendor who fully embraces the Golden State's values-driven commitment to equitable, inclusive benefits services that reflect the unique profile of each CalSAWS customer. Deloitte brings these values in our delivery.

Proven Results: Through our 200+ engagements in the past 10 years we have delivered best-in-class suite of enterprise solutions from the initial point of document ingestion all the way to final case resolution and archival. Our adaptive, client-specific approach also provides flexibility to support future priorities as business needs evolve. One example is our Pennsylvania Document Imagine Project highlighted below.

Spotlight: Our Pennsylvania Document Imaging Project

We recently completed an ECM project for the Pennsylvania's Department of Human Services (DHS) that covered the full implementation lifecycle, from requirements to final deployment and maintenance operations. The high-volume, OpenText implementation included 130–200K documents ingested daily through centralized and distributed scanning, public portal uploads, and mobile device captures. It supports multiple DHS program areas and has increased responsiveness, reduced errors, and driven lower case-turnaround times through straight-through processing. **The Governor recognized Deloitte with the prestigious Pennsylvania Excellence in Technology Award at the PA Digital Government Summit for our ECM implementation for Pennsylvania's DHS.**

5.2 Imaging Approach

The CalSAWS imaging system is a complex solution that supports a variety of mission critical use cases across California's 58 counties. As the Counties just went through a sizeable change from ImageNow to the Hyland SaaS solution, rather than immediately replacing the existing imaging solution, Deloitte proposes a phased approach with three distinct phases: **Stabilize, Optimize, Modernize**. These activities will occur over a 12-month base period as outlined within the framework below in Figure 5-2.

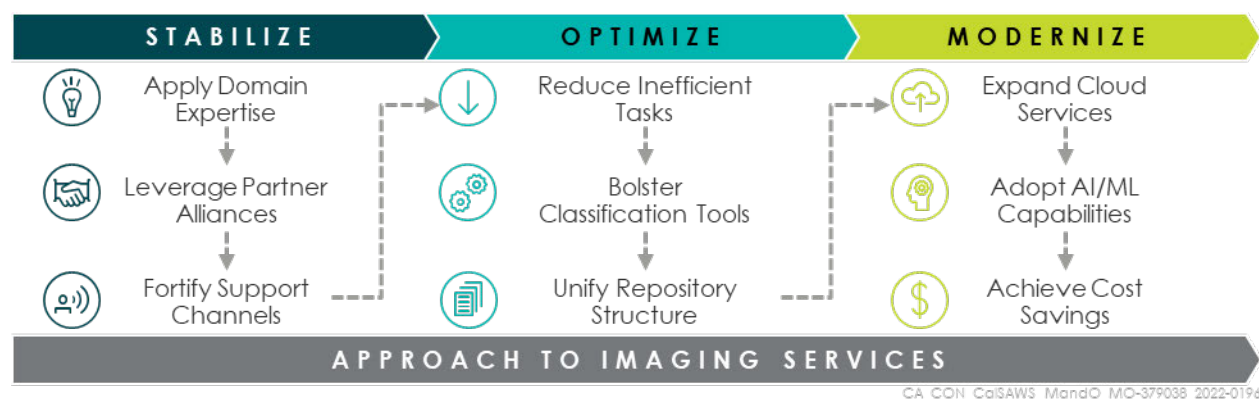


Figure 5-2. Deloitte's Imaging Services Framework.

After stabilizing and optimizing present-day capabilities within the existing technical framework, Deloitte produces a comprehensive roadmap for modernizing the CalSAWS imaging solution. This includes use of cloud-native architecture and upgraded AI/ML services that deliver improved system performance at a lower overall cost of ownership. Deloitte takes a balanced, vendor-agnostic approach to this assessment considering what drives stability, efficiency, productivity, and cost savings.

5.2.1 Stabilization Phase (3 Months)

Deloitte intentionally focuses on stabilizing the current-state Hyland imaging platform as a first step in the process. Our experience with several large Hyland implementations lets us to perform a rapid and seamless transition while focusing on stabilization and business continuity. It is critically important to obtain deep understanding of the functions, technical features, user tools, and general operability of the current system. This includes how ECM is integrated into the business processes supported by it prior to recommending any specific aspects of digital transformation. We leverage our experience from CalWIN ISS and BenefitsCal as a starting point to understand the business processes; recognizing that each County's process is different.

5.2.1.1 Transition-In

Our stabilization efforts commence immediately after a dedicated transition-in period that focuses specifically on maintaining full business continuity and preventing service disruptions while Deloitte assumes ownership of support for imaging services. The collective mantra during this multi-week period centers on "do no harm", so County personnel know that Deloitte is committing to active collaboration rather than abrupt directives that

undermine existing operations. This preparatory stage of the engagement aligns with our project-wide, transition-in sequence of Plan, Execute, Verify, and Cutover. As a core component of the Transition-In process, Deloitte establishes clear validation criteria relating to our assumption of certain support operations, delineation of key responsibilities alongside Hyland's cloud team, and relevant service level agreements.

5.2.1.2 Discovery Activities

Once our transition-in is fully established, an extensive series of discovery sessions pinpoint performance issues with the Brainware capture solution. We perform a root-cause gap analysis of any software limitations or workflow inefficiencies that exist within the current case management and benefits services procedures. Several milestone activities for this portion of the engagement include:

Conduct User Impact Research: Deloitte's Hyland technology specialists engage with a diverse array of CalSAWS users and stakeholders. This is to simulate authentic day-in-the-life evaluations of current Brainware and Perceptive system functions and user tasks to investigate far below the surface level, including observations from the field. When framing these focus groups, our aim is to attain comprehensive dialogue, contextual understanding, and diversity of roles, experiences, and work functions that surpass basic surveys or Q&A style interviews.

Deliberately Address Pain Points: Our initial dialogue with former County supervisors has identified the current OCR-driven file automation process as imperfect at best, and heavily flawed at worst. County leaders also lack dependable reporting tools to allow them to better monitor which files are sent to which personnel, in addition to a lack of clarity regarding the criteria used to auto-route certain images into exception queues. We can provide stability and clarity to the configuration process to help better serve intended purposes by applying our Hyland software expertise and leverage our Hyland alliance teammates as required. Additionally, documents today are all given the same weightage in terms of how they are processed. If a customer is requesting expedited services or provides a eligibility-impacting verification document, configuring those to be processed first is critical from a timeliness view as well as from an overall customer service impact.

Gather Performance and Metric Baselines: In addition to gathering genuine front-line insights rooted in real-world scenarios, a separate data collection venture occurs to obtain volumes, system traffic, and daily portal functions. Rather than drawing conclusions based on broad metrics like average documents per day or total users per month, we identify advanced statistics such as average transactions per daytime hour. We also conduct a countywide evaluation of which tasks are most time consuming. This enables us to determine if these delays are linked with systemic "chokepoint" issues within the Hyland solution or can be mitigated through alternative support channels.

We facilitate accompanying dialogue with Hyland service representatives as a reflection of our long-standing alliance. These discussions enable Deloitte to express candid observations within a collaborative environment that is solely focused on bringing actionable solutions to CalSAWS.

Expand Help Resources and Training Support: Lastly, the stabilization phase conclude with identifying new help desk style resources and troubleshooting references by deploying Deloitte solution specialists to develop capabilities for CalSAWS end-users. We update guidelines, conduct in-person workshops, and provide live virtual assistance that directly reflects the pain points, unfamiliar features, and learning curve limitations identified during the discovery sessions.

5.2.1.3 Foundational Closeout

We are confident our approach “bridges the gap” between the current day CalSAWS operating framework and untapped features, tools, or capabilities available within the Brainware suite of services. We do this without requiring contract renegotiations or incremental spending by combining Deloitte’s experience with Hyland products and services with our new infusion of frontline insights.

5.2.2 Optimization Phase (6 Months)

As an extension of the information obtained during day-in-the-life discovery evaluations, Deloitte present a multi-tier summary of proposed process improvements. They are fully vetted and evaluated by our ECM professional and are the result of the following activities:

5.2.2.1 System Performance

Cataloging/Validating User-Level Enhancements: The collective theme for optimization efforts centers on elevating the County-level experience. It focuses on reducing inefficient tasks and bolstering software performance in areas that frequently experience lag times or require multiple workflow stages. We specifically avoid adoption of broad-based, blanket solutions that only resonate in collective terms. Instead, our activities are tested, validated, and approved by a wide range of County-level personnel to enable user-level empowerment while protecting uniformity of policies, procedures, and technical protocols across the state.

Reduce System Efficiencies: From a tactical perspective, we also use our Hyland alliance during optimization efforts to explore methods for bolstering document services at the point of ingestion and expediting classification within the Brainware capture system. Even if certain procedures are perceived as “good enough” within the current state, our optimization efforts help CalSAWS users capitalize on the full range of tools and shortcuts available within the Perceptive/Brainware platforms, even if they exist outside their typical administrative routine.

5.2.2.2 Data Enhancement

Develop Custom Analytics: Optimization establishes a new series of performance measures that reflect the level of output, speed, and reliability necessary to achieve CalSAWS core business objectives. This is in addition to identifying activities that are conducive to future automation. This key data is then translated into consistent, reportable terms that can be regularly incorporated into agency-wide analytics tools. For example, a “Director ECM Dashboard” that displays critical technology metrics, corresponding SLAs, and countywide outputs within a live action heatmap style format, Deloitte positions statistical data as a valuable source of proactive awareness rather than a solely ex post facto reference point.

5.2.2.3 Financial Assessment

Examine Cost Commitments: In terms of pricing considerations, we evaluate the usage and accompanying efficacy of Hyland's core document management services to identify possibilities for greater cost effectiveness. This initial evaluation also assesses the short-term value and long-term benefits (or disadvantages) of maintaining differing storage/archival sources between the Hyland Perceptive system and separate S3 buckets.

We execute a comprehensive “zero-based” assessment of CalSAWS required features, system capabilities, and desired ancillary products for both image capture and document management. As an extension of this effort, Deloitte assists CalSAWS in determining precisely what those services should truly cost in modern market terms, rather than accepting continuous, high-priced licensing and hosting fees as an unavoidable cost of doing business.

5.2.3 Modernization Phase (Ongoing 3 Month Sprints)

The Deloitte approach concludes with a comprehensive recommendation for system modernization. This evaluation serves as an “innovation roadmap” that considers leading practices in imaging technology (e.g., cloud-native, AI/ML, etc.) while prioritizing long-term operational viability and financial sustainability. Deloitte provides this assessment objectively and without influence from any software vendor, considering only what is in the best interest of the Consortium, the Counties and associated stakeholders.

As noted earlier, we believe the current imaging system should be modernized as it is the most costly state imaging system we have seen and is not currently leveraging the latest cloud and ML/AI technologies that would drive greater efficiency in document processing. Per the Section 15 of the RFP, the Contractor will maintain and enhance the Imaging application as defined by approved SCR(s). Based on this, we anticipate that modernization of the solution will follow the SCR process, for which we have included a base set of annual hours to modernize the solution. Tools such as Hyperscience, Google Document AI, AWS Textract, and others are driving innovation that automate and streamline document processing tasks far beyond what CalSAWS current system achieves. Given the rapid innovation taking place currently in the document processing area and the timing of this modernization, we will recommend the toolset that brings the greatest value to the Consortium during the Modernization phase.

5.2.3.1 New Software Providers

Establish New Budgetary Framework: Modernization activities will incorporate a top-to-bottom analysis of current investments and future spending projections to determine the most financially advantageous path forward for CalSAWS. Once this analysis has concluded, Deloitte considers whether clear cost and efficiency gains can be achieved through the use of modernized, alternative imaging technologies. Unfortunately, the current Hyland pricing was not accessible to be evaluated to determine the root cause of the overall cost drivers.

Evaluate Capture Solution Alternatives: The Optimization phase's recommendations largely center on maximizing capabilities within the existing suite of services for Perceptive and Brainware. Modernization priorities take a broader view when pursuing next-level features and software tools. As such, this phase places deliberate emphasis on evaluating possible alternative imaging solutions that could transform document management operations by leveraging cloud-native solutions outside of the status quo. Deloitte will also apply intelligent document processing to the large volumes of documents captured through the BenefitsCal process, where document classification and extraction techniques are not being applied currently.

5.2.3.2 Next-Level Features & Services

Prioritize AI/ML Capabilities: Deloitte directly assists in the selection of full-featured AI/ML capabilities as an extension of our cloud-first approach in determining the ideal replacement solution for capture services. These advanced areas include categories like the use of vision-based technologies for document classification and extraction, and the ability to automatically redact sensitive data from specified documents. This recommendation receives the full complement of the latest industry offerings through our expansive talent pool of practitioners specializing in AI/ML services. This expert guidance is available to facilitate training and statewide adoption once test scenarios are proven effective.

Capitalize on Flexible Microservices: Deloitte's modernization analysis incorporates complementary microservices and system capabilities, alongside the efficiency-driven advancements made possible by AI/ML utilization into the solution. This enables the extraction, recognition, and integration of CalSAWS core file content into actionable data sets.

Adopt Cloud-Centric Repository: Modernization activities will also consider the need to upgrade document management services to a serverless, fully cloud-native repository. This component of the recommendation provides all the existing document management functions while delivering new features and flexible, highly scalable storage options at a fraction of the license-based costs currently in effect. Modern cloud-driven solutions also enable multi-tier options for configuring the repository structure to take advantage of lower-tiered storage for older documents that are not frequently accessed. Our approach also prioritizes document security throughout every phase of processing as the imaging solution collects, processes, shares, and archives millions of sensitive PII/PHI elements as part of day-to-day operations. While the application of cybersecurity to document processing is an afterthought for many imaging vendors, Deloitte views it as our top priority.

5.3 Staffing and Resource Allocation

Our proposed staffing allocations and fixed costs are structured based on the initial 12-month period that aligns with the core phases of stabilize, optimize, and modernize. We are not including any associated costs for replacement systems, new software licenses, or the accompanying resources required for full-scale implementation since this base period will conclude with the comprehensive recommendation and future-state roadmap for modernization. Instead, any follow-on activities will be incorporated within change order requests once a modernization approach is finalized in collaboration with the Consortium.

5.4 Strategic Benefits Summary

Features of our Approach	Benefits to CalSAWS
Utilizes Discovery Sessions as part of User Centered Design to Bring Insight to Actions	Deloitte supplements our current knowledge with a more in-depth understanding of imaging operations to provide process efficiencies leveraging the current technology platform. Building on our BenefitsCal's pioneering experience with User Centered Design, we engage with the Counties, Customers and Advocates to get qualitative insights from the challenges that individuals are facing from lost documentation, documentation routing to exception queues to documentation not being delivered timely to workers.
Comprehensive Analysis of All Documents	Deloitte will look at the big picture as we believe advanced iOCR processing should be applied to all incoming documents for maximum benefit. We believe documents arriving through the BenefitsCal portal must be addressed along with documents captured through other channels.
Embraces True Collaboration	Deloitte's long-term mindset and collaborative approach allow us to focus on critical needs and issues as a genuine stakeholder. This enables us to evolve and modernize the CalSAWS imaging in a vendor-agnostic manner.
Creates Data-Driven Empowerment	Our approach delivers analytics capabilities that fully inform key workgroups and enable leaders to take proactive measures to improve services and mitigate issues.
Transforms and Modernizes Capabilities	Modernization objectives and corresponding system replacements propel CalSAWS from a cloud-capable entity into a fully cloud-optimal enterprise that considers the impact of imaging best practices on day-to-day operations.
Achieves Value-Focused Savings	Deloitte believes that there is a great opportunity for the Consortium to drive down long-term imaging costs at the same time it modernizes imaging capabilities.

Table 5-2. Key Features of Our Approach.

Deloitte's three-phase approach to stabilize, optimize, and modernize imaging services establishes a clear foundation for the evolution of the CalSAWS imaging platform. Deloitte will initially focus on providing stability in the transition of current operations. We follow this with an optimization phase that will drive efficiencies in the processing of paper documents as well as documents submitted through the BenefitsCal portal. We will follow this with a modernization phase that leverages cloud and AI/ML techniques to bring the Consortium an imaging platform that increases automation, reduces manual processing, and increases case throughput while reducing overall costs.

Attachment G4 – DARFUR Contracting Act Certification

In accordance with Public Contract Code section 2204(a), the Bidder certifies that at the time the Proposal is submitted, the Bidder signing the Proposal is not identified on a list created pursuant to subdivision (b) of Public Contract Code section 2203 (<http://www.dgs.ca.gov/pd/Resources/PDLegislation.aspx>) as a person (as defined in Public Contract Code section 2202(e)) engaging in investment activities in Iran described in subdivision (a) of Public Contract Code section 2202.5, or as a person described in subdivision (b) of Public Contract Code section 2202.5, as applicable.

Bidders are cautioned that making a false certification may subject the Bidder to civil penalties, termination of existing contract, and ineligibility to bid on a contract for a period of three (3) years in accordance with Public Contract Code section 2205. Bidder agrees that signing the DARFUR Contracting Act Certification Form shall constitute signature of this Certification.

Darfur Contracting Act Certification

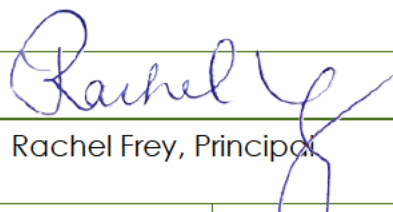
Pursuant to Public Contract Code section 10478, if a Bidder or Contractor currently or within the previous three years has had business activities or other operations outside of the United States, it must certify that it is not a “scrutinized” company as defined in Public Contract Code section 10476.

Therefore, to be eligible to submit a bid or Proposal, please complete only one of the following three paragraphs (via initials for Paragraph # 1 or Paragraph # 2, or via initials and certification for Paragraph # 3):

Initial	Attestation
	We do not currently have, or we have not had within the previous three years, business activities or other operations outside of the United States.
	We are a scrutinized company as defined in Public Contract Code section 10476, but we have received written permission from the Department of General Services (DGS) to submit a bid or Proposal pursuant to Public Contract Code section 10477(b). A copy of the written permission from DGS is included with our bid.
RF	We currently have, or we have had within the previous three years, business activities or other operations outside of the United States, but we certify below that we are not a scrutinized company as defined in Public Contract Code section 10476.

CERTIFICATION For # 3

I, the official named below, CERTIFY UNDER PENALTY OF PERJURY that I am duly authorized to legally bind the prospective Contractor/Bidder to the clause listed above in # 3. This certification is made under the laws of the State of California.

Contractor/ Firm Name	Deloitte Consulting LLP		
By (Authorized Signature)			
Printed Name and Title of Person Signing	Rachel Frey, Principal		
Date Executed	01/04/2023	Executed in County of	Sacramento, CA

Attachment G5 – Certificate of Firm Status

The Bidder shall attach either a copy of the Certificate of Status issued by California's Office of the Secretary of State, or a copy of the firm's active on-line status information downloaded from the California Business Portal Website. If the required documentation cannot be supplied, the Contractor must document an explanation.

On the following page, we have provided a copy of the Certificate of Status issued by California's Office of the Secretary of State.

State of California
Secretary of State

CERTIFICATE OF GOOD STANDING
FOREIGN LIMITED LIABILITY PARTNERSHIP

I, SHIRLEY N. WEBER, PH.D., Secretary of State of the State of California, hereby certify:

That on the **13th day of February, 2004**, **DELOITTE CONSULTING LLP**, a limited liability partnership organized and existing under the laws of **Delaware**, complied with the requirements of California law in effect on that date for the purpose of registering to transact intrastate business in the State of California;

That the above limited liability partnership is entitled to transact intrastate business in the State of California as of the date of this certificate subject, however, to any licensing requirements otherwise imposed by the laws of this state; and

That no information is available in this office on the financial condition, business activity or practices of this limited liability partnership.

IN WITNESS WHEREOF, I execute
this certificate and affix the Great Seal
of the State of California this day of
August 4, 2022.



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

NP-25 (REV 01/2021)

NLH

ATTACHMENT B4 – M&E STATEMENT OF COMPLIANCE WITH REQUIREMENTS

By completing and signing this form the Bidder confirms that it:

- Read the individual M&E Requirements within the M&E Statement of Work, **Attachment B2 – Maintenance & Enhancements Requirements Matrix.**
- Understands each individual M&E Requirement.
- Agrees to comply with each individual M&E Requirement.

By completing and signing this form, the Bidder also acknowledges that SCRs will continue to be applied to CalSAWS during the process of conducting this solicitation and the Transition Phase of the resultant Contract and agrees to take responsibility of, and comply with, all M&E requirements at the time the incumbent Contractor ends or upon the request of the Consortium Executive Director or designee.

The Bidder shall complete and include this form in their response in accordance with Section 6 Proposal Format and Submission. Failure to sign this certification may result in the Proposal being deemed nonresponsive.

SIGNATURE & DATE	 January 4, 2023	
NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	Rachel Frey, Principal	
COMPANY NAME	Deloitte Consulting LLP	
COMPANY ADDRESS	980 9 th Street, Suite 1800 Sacramento, CA 95814	

ATTACHMENT B7 – M&E EXCEPTIONS TO THE AGREEMENT

CONTRACTOR NAME Deloitte Consulting LLP

ADDRESS 980 9th Street, Suite 1800, Sacramento, CA 95814

TELEPHONE# () Email rfrey@deloitte.com

I have reviewed the **RFP Attachment B6 – M&E Agreement** in its entirety and have the following exceptions: Please identify and list your exceptions by indicating the Section or Paragraph number, and Page number, as applicable. Be specific about your objections to content, language, or omissions. Add as many pages as required.

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
1					<p>Pursuant to Q&A, the Consolidated Agreement is N/A for purposes of submittal as negotiations will be based on the Infrastructure and M&E Agreements.</p> <p>We note that Contractor and CalSAWS have reached agreement on terms in the past, through BenefitsCal and CalWIN ISS, and can leverage those terms if desired by CalSAWS.</p>
2	1	2	The terms and conditions in the body of this Agreement, which shall include all exhibits, which are hereby incorporated by reference;	The terms and conditions in the body of this Agreement, which shall include all exhibits, which	We have prepared a competitive response that is based on our interpretation of the requirements as set forth

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
			<p>The RFP for ongoing M&E Services; and</p> <p>Contractor's Proposal submitted in response to the RFP</p>	<p>are hereby incorporated by reference;</p> <p>Contractor's Proposal submitted in response to the RFP; and</p> <p>The Request for Proposal (RFP) for ongoing M&E Services</p>	<p>in the RFP. As the language in some of the requirements is subject to interpretation, we have staffed and priced based on our understanding of the requirements. As noted in our response we have indicated instances where we exceed your requirements and have included this as part of our price and associate staffing. We request that the proposal be above the RFP in order of precedence.</p>
3	2.29	5	...Deficiency as determined solely by the Consortium's reasonable judgement, e.g.	...Deficiency, e.g....	We request the unilateral determination and judgement portion be omitted so that the definition is objective.
4	2.95	12-13	The Documentation; all applicable County, State and federal policies, laws, codes, regulations and guidelines; the RFP; the Proposal; DEDs; Acceptance Criteria; subsequent Deliverables which have received Acceptance; and other specifications and requirements as described in the Statement of Requirements, Exhibit B to this Agreement, if any; the Project Control Document (PCD);	The Documentation; DEDs; Acceptance Criteria; previous Deliverables and Operational Working Documents (OWDs) which have received Acceptance; and other specifications and requirements as described in the Statement of Requirements, Exhibit B to this Agreement, if any...	We request to clarify the definition to be the DEDs, Acceptance Criteria, design deliverables and other agreed to requirements; they should capture and detail how to comply with laws, the RFP, and Proposal.

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
			M&E Services Plan and Operational Work Documents (OWD)...		
5	5.1.2.2	17	... (i) apprising County directors of any negative impacts to County business processes resulting from the CalSAWS System issue, whether it occurs in a training environment, the production environment, or a router fails in a PoP County;		Suggest revising the language in (i) as part of negotiations to reflect the delineation between the Infrastructure and M&E Contractors.
6	5.1.2.3	18	(3) While Contractor will be limited by this Agreement to use offshore resources in no more than 30% of the overall application maintenance hours, certain types of changes such as table updates, report changes and NOA changes to continue in this manner.	3) While Contractor will be limited by this Agreement to use offshore resources in no more than 40% of the overall application maintenance hours, certain types of changes such as table updates, report changes and NOA changes to continue in this manner.	Per Q&A clarification the allowable percentage is 40%.
7	5.1.2.6	20	Contractors will be expected to apply a structured approach for continually improving the Infrastructure and the CalSAWS System applications and supporting processes through innovative technologies and methods. Contractor will utilize the Consortium's current "Shark Tank" process and will fund innovation POCs emanating from that process.	Contractors will be expected to apply a structured approach for continually improving the CalSAWS System applications and supporting processes and support the Infrastructure Contractor in its plans to continuously improve the Infrastructure through innovative technologies and methods.	Recommended modification to reflect innovation of the CalSAWS System is the responsibility of the M&E contractor with improving the infrastructure being a support function of the M&E vendor in working with the Infrastructure contractor.
8	5.2	20	The Contractor will perform Deliverable Management activities in accordance with the Consortium's PCD.	The Contractor will perform Deliverable Management activities in accordance with the CalSAWS Enterprise PCD.	Aligned to reflect with definition in other sections.

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9	5.2.14	27			The majority of the tasks defined in this section pertain to transition as opposed to application and architecture evolution. Section needs to be updated to reflect the scope of services tied to this task.
10	5.4.1	33	Each Deliverable will be delivered to the Consortium Executive Director or his/her designee in one (1) hard copy form and on an electronic media in a format approved by the Consortium.	Each Deliverable will be delivered to the Consortium Executive Director or his/her designee in electronic media in a format approved by the Consortium.	Removal of hard copy requirement reflecting current business environment.
11	5.4.3	33	..."Consortium shall promptly..." "...shall either accept or not accept it following such review."	"...Consortium shall, within X days or such other period as the parties may agree to in writing,..." "...shall either accept or give a Notice of non-acceptance as described above, following such review, within X days of receipt."	We request this so both parties have set time periods and to clarify that the second review follows the same process as the first as to response.
12	5.4.4	34	...If following the Consortium's exercise of its option under (a) or (b) above, the Deficiency persists and the Contractor has failed to cure it in a timely fashion, the Consortium may exercise its right to terminate this Agreement as described in Sections 18.1 and 18.2. The Consortium's options under this Section 5.3 shall remain in effect	...If the Deficiency persists after the Contractor has at least received two opportunities to correct said Deficiency, the Consortium may exercise its right to terminate this Agreement as described in Section 18.2. The Consortium's options under this Section 5.3 shall remain in effect until Acceptance of all of the Deliverables.	We request to clarify the deliverable review process to allow the Contractor to attempt to resolve the issues at least two (up to 3) times prior to the Consortium exercising the option to terminate, and to point to the termination subsection pertaining to rejected deliverables. We have

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			until Acceptance of all of the Deliverables.		accounted for this as part of our deliverable staffing process.
13	5.5	34	"...no Deficiencies of sufficient gravity....to the Specifications."	"...no Deficiencies other than Cosmetic Deficiencies. The Consortium's Acceptance of a Deliverable does not discharge any of Contractor's warranties set forth herein."	We request that the Consortium's Acceptance should indicate no Deficiencies other than Cosmetic Deficiencies, as else there is not reason to thoroughly review.
14	6.3.2	34	...Key Personnel shall not be modified or removed except upon the express written approval of the Consortium's Executive Director	...Key Personnel shall not be modified or removed except pursuant to 6.3.6 below.	We request this minor edit to align with the terms of Section 6.3.6. This directly corresponds to LDs associated with key personnel replacement.
15	6.3.3	36	Contractor shall also provide to the Consortium résumés and two (2) references for all Staff prior to commencing work pursuant to this Agreement.	Contractor shall also provide to the Consortium résumés and two (2) references, in the form of name, title, organization, email address, phone number, for all Staff prior to commencing work pursuant to this Agreement.	As a number of reference organizations prohibit providing evaluations, request that the references be in the form of contact information as opposed to completing reference forms.
16	6.6.4	39	Contractor shall work with any Consortium-appointed or retained auditor to provide the information necessary for its independent assessment of Contractor's compliance with the Agreement...	Contractor shall work with any Consortium-appointed or retained auditor to provide the information necessary for its independent assessment of Contractor's invoicing compliance with the Agreement or any other information required to audit by applicable law or regulation.	To clarify the scope of this, where there are also the rights set forth above in Section 6.6.

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17	6.8	39-40		We request this be added: "The results of such reference checks shall not be disclosed by the Consortium and shall only be used to approve or disapprove of that Contractor Staff's assignment."	To provide confidentiality for such checks.
18	6.9.1	40	... caused by or due to the fault of Contractor or its failure to mitigate the effect of such delays caused by such other Contractors or vendors.	... caused by or due to the fault of Contractor or its failure to make reasonable efforts to mitigate the effect of such delays caused by such other Contractors or vendors. Add: However, in the event that said mitigation efforts as to delays caused by others cause Contractor to incur material costs individually or in the aggregate, Contractor will be fairly compensated for such costs.	We request that Contractor be required to make reasonable efforts to mitigate.
19	6.9.2	40	Contractor shall continue to perform its obligations that are not affected by the work of other contractors or vendors and shall mitigate any impact on Contractor from such delays caused by the Consortium's other Contractors or vendors.	Contractor shall continue to perform its obligations that are not affected by the work of other contractors or vendors.	Contractors cannot assert to mitigate impacts caused by other Contractors without evaluating the impact.
20	7.5	42-43	Consortium will hold back ten percent (10%) of each monthly	...Consortium will hold back ten percent (10%) of each monthly invoice during the Transition-In	Contractor would like to clarify with the Consortium the definition of Final

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			invoice until Final Acceptance of Deliverables.	Period until acceptance of all Deliverables for the Transition-In Period.	Acceptance as noted in 2.44 as the current definition reads once all deliverables are accepted which may be 11 years. Contractor requests a reasonable withhold period commensurate with a M&E engagement (i.e., withhold at the end of transition in, withhold tied to acceptance periods associated with new deliverables) as opposed to all deliverables and services.
21	8.1	44	The Consortium reserves the right to change any portion of the Deliverables or Services required under this Agreement and any other provisions of this Agreement.	The Consortium reserves the right to request changes to any portion of the Deliverables or Services required under this Agreement and any other provisions of this Agreement.	Contractor would like to clarify that all changes to the Services as agreed upon by the parties in the resulting contract shall be subject to the written approval of both parties as it will have an impact on the staffing mix. Additionally, it may impact HW/SW needs that could impact the overall price.
22	8.2	44	The Consortium may, at any time by a written Change Order, make changes to the Project that are within the scope of the Agreement...	The Consortium may, at any time by a written Change Order, request changes within the scope of the Agreement...	Contractor would like to clarify that all changes to the Services as agreed upon by the parties in the resulting contract shall be subject to the written approval of both parties as it will have an impact on the staffing mix. Additionally, it may impact

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					HW/SW needs that could impact the overall price.
23	8.6	45-46	...such a refusal, which shall be deemed a termination based on Contractor's default. In addition...	...such a refusal. In addition...	Inability to reach agreement should not be a termination for default.
24	9.3	47	Contractor shall continuously protect and be responsible for any loss, destruction, or damage to property which results from, or is caused by, Contractor's negligent or intentional acts or omissions or from the negligent or intentional failure on the part of Contractor to maintain and administer that property. Notwithstanding anything to the contrary herein, Contractor shall be liable to the Consortium for any damages resulting from damage to property, which damages result from or are caused by Contractor's negligent or intentional acts or omissions...	Contractor shall continuously protect and be responsible for any loss, destruction, or damage to real or tangible property which results from, or is caused by, Contractor's negligent or intentional acts or omissions or from the negligent or intentional failure on the part of Contractor to maintain and administer that property. Notwithstanding anything to the contrary herein, Contractor shall be liable to the Consortium for any damages resulting from damage to such property, which damages result from or are caused by Contractor's negligent or intentional acts or omissions.	Clarifying edit to add "real or tangible" property.
25	11.1	49	...shall meet all requirements, as set forth in this Agreement, including the Specifications and the M&E Services Plan, M&E Work Plan and OWDs. All Deliverables shall be complete, meet Specifications, adhere to the applicable DED, be provided timely as defined in the Work Plan, internally consistent,	...shall meet the applicable Specifications. The warranty period... Add: Contractor shall have no obligation under this Section 11 to make warranty repairs attributable to: (i) Consortium's misuse or modification of such Deliverable or the System; (ii)	Contractor requests the inclusion of industry standard exceptions, such as for the Consortium's misuse or modification, and the process for handling them. This impacts cost and staffing for warranty.

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			consistent with other related Deliverables, uniform in appearance, prepared by qualified personnel in accordance with standards, methods and Acceptance criteria as defined in the applicable DED, and be free of Deficiencies. The warranty period...	Consortium's failure to use corrections or enhancements made available by Contractor at no additional cost to Consortium; (iii) Consortium's use of such Deliverable or the System in combination with any product other than those specified by Contractor; (iv) the quality or integrity of data from other automated or manual systems with which such Deliverable or the System interfaces; (v) hardware, systems software, telecommunications equipment or software not a part of such Deliverable or the System which is inadequate to allow proper operation of such Deliverable or the System or which is not operating in accordance with the manufacturer's specifications; or (vi) operation or utilization of such Deliverable or the System in a manner not contemplated by this Agreement. If any such exception applies, Contractor shall notify Consortium, and Consortium shall compensate Contractor for Contractor's time (at the rates set forth in the applicable SOW) and reasonable, out-of-pocket	

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				expenses actually incurred in (a) determining the source of and analyzing such condition, and (b) to the extent approved by Consortium in advance, rendering consulting services to Consortium in remedying such condition.	
26	11.2	49	Contractor represents and warrants that Contractor shall perform the Services as described in this Agreement and in accordance with the M&E Services Plan, M&E Work Plan, OWDs, and applicable Specifications. Time is of the essence in connection with Contractor's performance of the Services according to the Consortium-approved Schedule. Contractor shall give due priority to the performance of the Services commensurate with the urgency of the task. Contractor shall perform all Services required pursuant to this Agreement in a professional manner, with high quality, knowledge and experience in business and systems integrations. All Services warranty work shall be at no additional cost to the Consortium during the term of this Agreement.	Contractor shall give due priority to the performance of the Services commensurate with the urgency of the task. Contractor shall perform all Services required pursuant to this Agreement in a professional manner, with high quality, knowledge and experience in business and systems integrations. All Services warranty work shall be at no additional cost to the Consortium during the term of this Agreement.	We believe that "time is of the essence" language is not appropriate for this type of engagement as we work closely with the Consortium and our performance has dependencies. Also, for services the warranty should be that stated in the second half of the clause.

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27	11.5	51		We would propose to remove 11.5.1 and 11.5.2 as overlapping with the prior warranties.	
28	11.6.3.5	52	The Consortium shall peacefully and quietly have, hold, possess, and enjoy each Deliverable without suit or interruption.	The Consortium shall, to the best of Contractor's knowledge, peacefully and quietly have, hold, possess, and enjoy each Deliverable without suit or interruption.	We request that language be added to denote to best of the Contractor's knowledge where we cannot prevent this.
29	11.6.4	52-53	...which arise from any Contractor noncompliance with the federal, State, or County laws, regulations, codes, policies and guidelines resulting from Contractor's or its Subcontractors' performance of their obligations.	...which arise from any Contractor noncompliance with the federal, State, or County laws and regulations applicable to Contractor or its Subcontractor in its or their performance of their obligations.	To clarify it is our noncompliance with those that apply to us/our subcontractors in our performance.
30	11.7	53-54		We request removal of this clause as the Consortium has breach remedies and other remedies stated throughout the agreement and at law. If Consortium wishes to have someone else perform certain services, it may terminate those services, maintaining its remedies.	To allow dispute resolution processes and the other contract remedy clauses to apply.
31	12.1	54	...arising from, connected with, or related to claims and lawsuits by third parties, for any damages of any nature whatsoever for bodily injury...	...arising from claims and lawsuits by third parties for any damages of any nature whatsoever for...	Just making clearer these are claims arising from these claims and lawsuits, where connected with/related to is less clear

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32	13.1	55		We request the following be added to the end of Section 13.1: "However, Contractor shall not be liable for liquidated damages or failed, delayed, and/or performance not in compliance if the same or failure to meet Performance Requirements is due to any act, event or omission outside of the control of Contractor or its subcontractors. . In the event more than one Performance Requirement is not met as a result of an act or omission by Contractor, Contractor will only be liable for the Liquidated Damages for one such Performance Requirement (as chosen by the Consortium). Contractor's maximum aggregate liability for Liquidated Damages incurred in a given month in an amount shall be XXXX and aggregate liability for Liquidated Damages incurred under the Contract shall be YYYY."	To clarify for situations when the issue is caused by other events, acts or omissions outside Contractor control. We also request a monthly cap on Liquidated Damages.
33	14.1	58	...withhold payments to Contractor, in whole or in part, until...	...withhold payments to Contractor for the applicable Services or Deliverable, in whole or in part, until...	To clarify that the withholding will be as to the on-conforming Services or Deliverables.

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34	14.3	58-59	In the event a default by Contractor is not so substantial as to require termination, reasonable efforts to induce Contractor to cure the default are unavailing, and the default is capable of being cured by the Consortium or by another resource without unduly interfering with continued performance by Contractor, the Consortium may provide or procure the Deliverables or Services reasonably necessary to cure the default, in which event Contractor shall reimburse the Consortium an amount equal to the difference between Contractor's charges for such Deliverables or Services and the reasonable cost of the Deliverables or Services. In addition, Contractor must cooperate with these resources in allowing access to the M&E Deliverables.	In the event a default by Contractor is not so substantial as to require termination, reasonable efforts to induce Contractor to cure the default are unavailing, and the default is capable of being cured by the Consortium or by another resource without unduly interfering with continued performance by Contractor, the Consortium may provide or procure the Deliverables or Services reasonably necessary to cure the default. In addition, Contractor must cooperate with these resources in allowing access to the M&E Deliverables.	We request to allow dispute resolution processes to determinate damages based on the facts, causality and damages.
35	14.3	58-59	...to cure the default....the Deliverables or Services. In addition...	...to cure the default. In addition...	We wish to remove the automatic reimbursement portion, as Contractor may be found liable for cover costs, but that should be per dispute resolution versus automatic.
36	14.4.4	59	Upon receipt of notice of final disposition by Contractor, the Consortium reserves the right to	Upon receipt of notice of final disposition by Contractor, the Consortium reserves the right to	Contractor requests that language be clarified to tie the withhold to payments

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			suspend all, or part of, the Agreement for a period no greater than thirty (30) calendar days, and to withhold further payments, or to prohibit Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action, if necessary, by Contractor or a decision by the Consortium to terminate in accordance with Sections 18.1 or 18.2.	suspend all, or part of, the Agreement for a period no greater than thirty (30) calendar days, and to withhold further payments for the portion of suspended Services, or to prohibit Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action, if necessary, by Contractor or a decision by the Consortium to terminate in accordance with Sections 18.1 or 18.2.	associated with the suspended services as opposed to all further payments whereby the Contractor may be performing successfully.
37	14.7	60	EXCEPT FOR INDEMNIFICATION OBLIGATIONS, (i) CONTRACTOR'S LIABILITY TO THE CONSORTIUM UNDER THIS AGREEMENT SHALL NOT EXCEED THE TOTAL CHARGES PAID AND TO BE PAID BY THE CONSORTIUM TO CONTRACTOR UNDER THE AGREEMENT, INCLUDING WITHOUT LIMITATION, CHANGE ORDER PRICES AGREED TO BY THE PARTIES OR OTHERWISE ADJUDICATED, AND (ii) CONTRACTOR SHALL NOT BE LIABLE FOR CONSEQUENTIAL, INDIRECT, OR INCIDENTAL DAMAGES UNDER CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHER LEGAL THEORY, REGARDLESS OF THE CAUSE OF ACTION AND EVEN IF THE	EXCEPT FOR INDEMNIFICATION OBLIGATIONS, (i) CONTRACTOR'S LIABILITY TO THE CONSORTIUM UNDER THIS AGREEMENT SHALL NOT EXCEED, IN AGGREGATE, THE TOTAL CHARGES PAID BY THE CONSORTIUM TO CONTRACTOR UNDER THE AGREEMENT FOR SERVICES DURING THE 12 MONTH PERIOD PRECEDING THE DATE UPON WHICH THE FIRST CAUSE OF ACTION ACCRUED, INCLUDING WITHOUT LIMITATION, CHANGE ORDER PRICES AGREED TO BY THE PARTIES OR OTHERWISE ADJUDICATED, AND (ii) CONTRACTOR SHALL NOT BE LIABLE FOR CONSEQUENTIAL, INDIRECT, INCIDENTAL,	We request the formula be 12 months of fees and the exceptions' section numbers seemed to need adjusting and per our responses to certain of those sections, we request removal of automatic cost of cover but agree to the concepts in Section 18.4 and agree to stipulate they would not be consequential damages.

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			CONTRACTOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. FOR PURPOSES HEREOF, THE SPECIFIED PAYMENT REMEDIES SET FORTH IN SECTIONS 11.8, 14.3, 16.4, AND 19.24 OF THIS AGREEMENT AND DAMAGES ARISING FROM BREACH OF SECTION 15, CONFIDENTIAL DATA, SHALL NOT BE DEEMED CONSEQUENTIAL, INDIRECT, INCIDENTAL, EXEMPLARY OR PUNITIVE DAMAGES BUT RATHER SHALL BE SUBJECT TO SUBCLAUSE 14.7(i).	EXEMPLARY OR PUNITIVE DAMAGES UNDER CONTRACT, TORT (INCLUDING NEGLIGENCE), OR OTHER LEGAL THEORY, REGARDLESS OF THE CAUSE OF ACTION AND EVEN IF THE CONTRACTOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. FOR PURPOSES HEREOF, THE SPECIFIED PAYMENT REMEDIES SET FORTH IN SECTION 18. OF THIS AGREEMENT AND DAMAGES ARISING FROM BREACH OF SECTION 15, CONFIDENTIAL DATA, SHALL NOT BE DEEMED CONSEQUENTIAL, INDIRECT, INCIDENTAL, EXEMPLARY OR PUNITIVE DAMAGES BUT RATHER SHALL BE SUBJECT TO SUBCLAUSE 14.7(i).	
38	15.3	61	The Consortium reserves the right to monitor, audit or investigate Contractor's use of the Consortium's and/or third parties' Confidential Information collected, used, or acquired by Contractor under this Agreement.		We request removal of this clause, as we are not sure how this would take place. We can instead answer questions.
39	16.1	63	...Contractor shall include the Counties, its boards, agencies, contractors, officers, employees, agents and volunteers, and the State, both individually and collectively, as additional named insureds on Contractor's	... Contractor shall include the Counties, its boards, agencies, contractors, officers, employees, agents and volunteers, and the State, both individually and collectively, as additional insureds on the commercial	We propose certain changes to the insurance language to be more consistent with the insurance that we (as well as other large professional services firms) maintain.

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			commercial general liability and auto liability policies. Such insurance shall apply as primary insurance for these additional insureds specific to Contractor's activities hereunder. Contractor shall include the Counties, its boards, agencies, contractors, officers, employees, agents and volunteers, and the State, its officers, employees, and agents, both individually and collectively, as additional named insureds on Contractor's commercial general liability and auto liability policies...The minimum acceptable limits shall be as indicated below with no deductible except as indicated below:	general liability and auto liability policies with respect to Contractor's acts or omissions in performance under this Agreement. Such insurance shall apply as primary insurance for these additional insureds specific to Contractor's activities hereunder... The minimum acceptable limits shall be as indicated below:	
40	16.1.1	63	Commercial General Liability or equivalent self-insurance covering the risks of bodily injury (including death), property damage and personal injury, including coverage for contractual liability, with a limit of not less than \$1 million per occurrence/\$2 million general aggregate;	Commercial General Liability or equivalent self-insurance covering the risks of bodily injury (including death), property damage and personal and advertising injury, including coverage for contractual liability pursuant to policy terms and conditions, with a limit of not less than \$1 million per occurrence/\$2 million general aggregate	
41	16.1.3	64	Employer Practices Liability Insurance covering the risks of Contractor's Staff and employees'	Employer's Liability Insurance covering the risks of Contractor's Staff and employees' bodily	

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			bodily injury by accident or disease with limits of not less than \$1 million per accident for bodily injury by accident and \$1 million per employee for bodily injury by disease	injury by accident or disease with limits of not less than \$1 million per accident for bodily injury by accident and \$1 million per employee for bodily injury by disease and \$1 million policy limit by disease	
42	16.2	64	Prior to providing Services under this Agreement, Contractor shall, in full compliance with California state law, provide or purchase, at its sole cost and expense, statutory California's workers' compensation coverage for its employees as required and employers' liability in the minimum amount of \$1 million per bodily injury by accident and \$1 million per bodily injury by disease. This policy shall remain in full force and effect during the term of the Agreement. The worker's compensation policy obtained by Contractor shall include the Counties, its boards, agencies, contractors, officers, employees, agents and volunteers, and the State, both individually and collectively, as additional named insureds under this policy. Should Contractor fail to secure worker's compensation insurance coverage or fail to pay premiums on behalf of its employees, the Consortium may terminate this Agreement under	Prior to providing Services under this Agreement, Contractor shall, in full compliance with California state law, provide or purchase, at its sole cost and expense, statutory California's workers' compensation coverage for its employees as required and employers' liability in the minimum amount of \$1 million per bodily injury by accident and \$1 million per bodily injury by disease. This policy shall remain in full force and effect during the term of the Agreement. Should Contractor fail to secure worker's compensation insurance coverage or fail to pay premiums on behalf of its employees, the Consortium may terminate this Agreement under Section 16.1 (Termination for Material Breach).	

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			Section 16.1 (Termination for Material Breach), or alternatively, and solely at the discretion of the Consortium, deduct the amount of premiums owing for a policy of worker's compensation insurance coverage from the amounts payable to Contractor under this Agreement and transmit the same to the responsible State agency.		
43	16.3	64	... Subcontractor(s) shall comply fully with all insurance requirements stated herein...	...Subcontractor(s) shall comply fully with all insurance requirements stated herein or shall be subject to insurance levels and types that are commensurate with the risks associated with the Services being subcontracted...	
44	16.4	64-65	...written Notice has been given to the Consortium Executive Director, and Contractor has replacement insurance policy(ies) in place that satisfy the requirements...	...written Notice has been given to the Consortium Executive Director unless replacement coverage meeting the terms and conditions hereunder is obtained without lapse, and Contractor has replacement insurance policy(ies) in place that satisfy the requirements...	
45	16.5	65	Contractor shall furnish to the Consortium copies of certificates...	Contractor shall furnish to the Consortium copies of industry standard ACORD certificates...	
46	17.4	67	...Consortium's right to terminate this Agreement...Contractor may contest...	...A party's right to terminate this Agreement...The other party may contest...	It seems this should be mutual where both parties have termination rights.

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47	18.9.1	69	...for any such Deliverables accepted by the Consortium.	...for any such Deliverables.	If Consortium is keeping them it should pay for them, even if not accepted.
48	18.9.2	69	Upon termination of this Agreement due to Contractor's breach of any of its obligations owing pursuant to this Agreement, the Consortium may withhold from any amounts due Contractor for Deliverables or Services such sum as the Consortium's Executive Director determines to be reasonably necessary to protect the Consortium from potential loss or liability.		We propose removal of this broad withhold right; the Consortium has other withhold rights and other remedies, including Section 18.9.5.
49	18.9.6	70	Contractor shall provide to the Consortium all information requested by the Consortium that is necessary to facilitate a subsequent bidding process without additional costs or fees.		We request removal of this clause, as we expect the Consortium will already possess all that it needs.
50	18.9.7	70	Contractor shall provide to the Consortium, without additional cost to it, and at least thirty (30) days prior to the expiration or termination of this Agreement, all files, data, and records necessary to effect the least disruptive and costly transition as possible under the circumstances.	Contractor shall provide the Consortium.....necessary to effect a commercially standard, professional transition.	We request this change to tie the transition to a commercial standard.
51	19.3	71	...to any governmental entity...	...to any State of California governmental entity...	We request this as we otherwise have to check for conflicts and follow our client

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				May we also add: "There shall be no third party beneficiaries to this Agreement."	acceptance procedures. We also request clarification that there are no third party beneficiaries to the Agreement.
52	19.7	71	Contractor must submit claims against the Consortium...upon which Contractor...	Each party must submit claims against the other...upon which such party...	We request that both parties be bound to the same claim time period so that claims and counterclaims are within the same rules.
53	20	85-89	All Work will be conducted in accordance with all data privacy and security requirements included in the Agreement, including but not limited to, the requirement that all Work performed remotely or offshore must take place within a secure bay dedicated to the Work ("Secure Bay").		As the working environment has moved to hybrid some individuals may work from a remote location (i.e., their home). We request to discuss this as part of negotiations to come to a mutually agreeable approach that accounts for changes in the working environment. On other engagements with the State of California a Secure Bay is used for production environments. As the remote teams will not have access to production data, we would also like to discuss alternatives as part of negotiations.
54	Exhibit D, Contractor Employee Acknowledgment, Confidentiality,	D-2	I understand and agree that breach of this Agreement may cause irreparable harm for which money damages may not provide adequate compensation, and that	I understand and agree that breach of this Agreement may cause irreparable harm for which money damages may not provide adequate	We request an edit to clarify that the Consortium may seek relief pursuant to the applicable dispute resolution provision and to be clear the

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
	and Intellectual Property Assignment Agreement		Consortium is entitled to seek injunctive relief against any breach or threatened breach of confidentiality (without proving actual damage or posting a bond or other security). I further understand and agree that the confidentiality and non-disclosure obligations contained in this Exhibit D as well as the Consortium Contract shall last in perpetuity.	compensation, and that Consortium is entitled to seek relief pursuant to the applicable dispute resolution provision. I further understand and agree that the confidentiality and non-disclosure obligations contained in this Exhibit D as well as in the Consortium Contract shall last in perpetuity.	survival is as to confidentiality obligations.
55	Exhibit D, Contractor Employee Acknowledgment, Confidentiality, and Intellectual Property Assignment Agreement	D-2 – D-3	...as such terms are defined or described in the Consortium Contract described above, developed or acquired by me in whole or in part pursuant to the Consortium Contract, and all works based thereon, incorporated therein, or derived therefrom, shall be the sole property of the Consortium. I hereby assign and transfer to the Consortium in perpetuity for all purposes all my right, title, and interest in and to all such items, including, without limitation, all unrestricted and exclusive copyrights, patent rights, trade secret rights, and all renewals and extensions thereof.	...as such terms are defined or described in the Consortium Contract described above, developed or acquired by me in whole or in part pursuant to the Consortium Contract, and all works based thereon, incorporated therein, or derived therefrom (hereinafter referred to as "Work Product"), shall be the sole property of the Consortium. In light of the foregoing agreement, and as required by, and subject to, and in accordance with the Consortium Contract, I hereby assign and transfer to the Consortium in perpetuity for all purposes all my right, title, and interest in and to all Work Product, including, without limitation, all unrestricted and exclusive copyrights, patent	We request minor clarifying changes to this section.

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
				rights, trade secret rights, and all renewals and extensions thereof, as well as all other intellectual property rights and other rights (such as goodwill, benefits, privileges, causes of action, and remedies) in connection with the Work Products. Subject to and in accordance with the Consortium Contract, all Work Product shall be deemed works made for hire of Consortium for all purposes of copyright law, and copyright shall belong solely to Consortium. In the event that any such work is adjudged to be not a work made for hire, Contractor agrees to assign, and hereby assigns, all rights in such work to Consortium subject to and in accordance with the Consortium Contract. In the event a court of competent jurisdiction finds such an assignment to be unenforceable, Contractor agrees to provide Consortium with a non-exclusive license providing Consortium with all rights, title, and interest the assignment otherwise would have provided.	
56	Exhibit D, Contractor	D-3	Subject to the provisions of the Consortium Contract, the	Subject to the provisions of the Consortium Contract, the	We request minor clarifying changes to this section.

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
	Employee Acknowledgment, Confidentiality, and Intellectual Property Assignment Agreement		Consortium shall have the right to register all copyrights in the name of the Consortium and shall have the right to assign, license, or otherwise transfer any and all of the Consortium's right, title, and interest, including, without limitation, copyrights, in and to the items described above.	Consortium shall have the right to register all copyrights in the Work Product in the name of the Consortium and shall have the right to assign, license, or otherwise transfer any and all of the Consortium's right, title, and interest, including, without limitation, copyrights, in and to the Work Product described above.	
57	Exhibit E, HIPAA Business Associate Agreement, Section III.C.3	F-3 – F-4	<p>To take reasonable steps designed to ensure the continuous security of all of its computerized data systems containing PHI and/or PI, and to protect paper documents containing PHI and/or PI...</p> <p>...d. In case of a conflict between any of the security standards contained in any of these enumerated sources of security standards, the most stringent shall apply... Further, Business Associate must comply with changes to these standards that occur after the effective date of this Agreement.</p>	<p>To take reasonable steps designed to ensure the continuous security of all of its computerized data systems containing PHI and/or PI, and to protect paper documents in its possession containing PHI and/or PI...</p> <p>...d. In case of a conflict between any of the security standards contained in any of these enumerated sources of security standards in this Section, the most stringent shall apply... Further, Business Associate must comply with changes to these standards to the extent required by the HIPAA Security Rule that occur after the effective date of this Agreement...</p>	We request minor clarifying changes to this section.

#	SECTION	PAGE #	ORIGINAL LANGUAGE	PROPOSED LANGUAGE	ANTICIPATED IMPACT TO STAFFING AND COST, AS APPLICABLE
58	Exhibit E, HIPAA Business Associate Agreement, Section III.F.3	F-5	If Business Associate receives data from the Consortium that was provided to the Consortium by the Social Security Administration and identified as such, upon request by the Consortium, Business Associate shall provide the Consortium with a list of all employees, contractors and agents who have access to the Social Security data, including employees, contractors and agents of its subcontractors and agents.	If Business Associate receives data from the Consortium that was provided to the Consortium by the Social Security Administration and identified as such at the time provided to Business Associate, upon request by the Consortium, Business Associate shall provide the Consortium with a list of all employees, contractors and agents who have access to the Social Security data, including employees, contractors and agents of its subcontractors and agents.	We request a minor clarifying change to this section.
59	Exhibit E, HIPAA Business Associate Agreement, Section III.J.1	F-5	... any security incident affecting ePHI, or unauthorized access, use or disclosure of PHI or PI by Business Associate in violation of this Agreement and this Addendum...		Could the Consortium clarify if the definition of "Security Incident" covers an "intrusion"? We weren't sure what this means.
60	Exhibit E, HIPAA Business Associate Agreement, Section III.J.1 (a)	F-6	...a. Prompt corrective action to mitigate any risks or damages involved with the breach and to protect the operating environment; and...	...a. Prompt corrective action to mitigate, to the extent practicable, any risks or damages involved with the breach and to protect its operating environment; and...	We request minor clarifying changes to this section.

Name of Authorized Representative Rachel Frey, Principal

Signature of Authorized Representative 

Date January 4, 2023

ATTACHMENT B8 – M&E FIRM MANDATORY QUALIFICATIONS

Attachment B8 contains the M&E Firm Mandatory Qualifications in the format as provided by the RFP.

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Minimum Experience ME-F1

Minimum Experience 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	Contact #1
Company Name: State of Texas Health and Human Services Commission (HHSC)	Contact Name: [REDACTED]
Project Name: Texas Integrated Eligibility Redesign System (TIERS)	Contact Title: TIERS Contract Manager
Contract Date(s): July 28, 2018 – March 21, 2023 + 2 (2-year) extensions	Address: 1609 Center Creek Drive, Austin, TX 78754
Contract Duration (months): 55 months + 48 Months (optional)	Phone Number: [REDACTED]
Contract Amount: \$192M+	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Deloitte has worked with Texas HHSC over the past 17 years to design and build the Texas Integrated Eligibility Redesign System (TIERS), a large and complex IT system supporting eligibility/case management of programs similar to CalSAWS. Deloitte's TIERS project contract has a value of at least ten million (\$10,000,000) dollars. The TIERS Solution integrates 9 applications, 9 of which are COTS, and interfaces with 34 external systems, 3 of which are real-time. Over 10k users access TIERS across 889 locations. The solution includes multi-tiered processing, including a customer or user facing front-end.</p> <p>In support of TIERS, Deloitte maintains and enhances an ecosystem of integrated applications, including YourTexasBenefits.com (self-service portal), YourTexasBenefits Mobile (mobile application), and Long-Term Services and Support (LTSS). TIERS was the first Java/JEE integrated eligibility system built in the United States. TIERS revolutionized and streamlined the way HHSC conducts business throughout Texas. Since the successful statewide go-live in December 2011, the team has incrementally modernized TIERS by supporting Medicaid modernization under the Affordable Care Act (ACA), adding Children's Health Insurance Program (CHIP) eligibility functionality into TIERS, and implementing the most downloaded government mobile application in the United States—YourTexasBenefits Mobile. More recently, Deloitte has collaborated with the HHSC to transform software development and maintenance from a Waterfall-based approach to 100% Agile-based delivery.</p> <p>TIERS is currently the nation's largest statewide integrated eligibility determination system for Medicaid, Supplemental Nutrition Assistance Program (SNAP), and Temporary Assistance for Needy Families (TANF) benefits. TIERS manages delivery of sixty-four (64) types of assistance, including food, cash, medical, and community care services to Texans in need. TIERS automates complex rule-</p>	

Minimum Experience 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.

based processing, ensuring consistency in eligibility determination. Serving more than eight (8) million recipients annually, TIERS is a mission-critical system for HHSC and for the State of Texas. TIERS Suite of Applications users include:

1. Clients (individuals or families applying for or receiving government assistance)
2. Community-Based Organizations (CBOs)
3. Customer Service Representatives (CSRs)
4. HHSC staff and other State of Texas agency staff
5. Trading Partners

Minimum Experience Requirements:

- **Application Maintenance**

The Deloitte Support and Maintenance Services (SMS) team is responsible for batch schedule management, batch automation, escalation and reporting, and batch performance management. The SMS team also collaborates with HHSC's Level II Help Desk to troubleshoot, triage, and provide resolutions as part of Level III Help Desk services. If there are temporary operational procedures that need to be defined, Deloitte works with HHSC Subject Matter Experts (SMEs) to help identify such procedures, validate the resolutions in test environments, and assist with the necessary documentation and communication. Additionally, there are times when issues reported by end users require data updates to provide short-term, quick resolutions. Deloitte's SMS team works with HHSC to identify the data fix, execute and validate the results in test environments, gain approval from HHSC SMEs, and coordinate the Production implementation to make sure that the data fix and end-user actions occur in the correct sequence.

- **System Modifications**

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 business priorities (e.g., workload impact reductions, cost savings, and fraud prevention). The DDI team works with business and IT stakeholders to develop a product roadmap and conduct IT assessment meetings to develop High Level Epic Estimates (HLEEs). Following that effort, the team works on decomposing Epics by documenting requirements in the form of User Stories through the Discovery process. 12 Deloitte Sprint teams then work in 4-week increments to develop and test software changes. The Sprints include product demos with business and IT stakeholders to gain acceptance.

Minimum Experience 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.

Results Achieved:

Together, Deloitte and HHSC have achieved tremendous successes on the TIERS program. Key accomplishments are listed below:

- TIERS allows workers to manage the application and case management processes effectively and efficiently for the public assistance programs via a web-based and user-friendly graphical interface. This interface contains features promoting worker efficiencies, thereby improving services and operations. For example, integrating the CHIP program with TIERS resulted in an annual savings of approximately \$16M each year in operational costs.
- YourTexasBenefits.com is an online self-service portal that allows clients to apply for benefits, submit changes, access their benefit information, and renew benefits online. The information entered into the self-service portal is automatically populated in TIERS for the worker to review and process. Both systems are custom-developed solutions.
- The YourTexasBenefits Mobile app complements the HHS benefits application process and enables clients to use native features of their phones. Users can upload files/forms using the camera, speeding up the benefits process. Other features of the application include alert notifications, change reporting, and the ability view in-app correspondence.
- The Long-term Services and Support (LTSS) Worker Portal is part of the Balancing Incentive Program (BIP) initiative and helps people access long-term services and supports in community-based settings.
- TIERS is a fully integrated eligibility system comprising over nine (9) different applications; development occurs concurrently across 25 scrum teams. Deloitte has expertise in managing this complex system, which has over 50 interconnected systems.
- Over 10,000 unique users rely on TIERS every day. Serving more than 8 million recipients annually, TIERS is a mission-critical system for HHSC and for the State of Texas. The TIERS Suite of Applications includes multiple user-facing applications, including the main TIERS worker portal.

Minimum Experience 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 #2	Contact #2
Company Name: State of Colorado, Governor's Office of Information Technology	Contact Name: [REDACTED]
Project Name: Colorado Benefits Management System (CBMS)	Contact Title: Division Director, Food & Energy Assistance
Contract Date(s): November 24, 2008 – June 30, 2024	Address: 1575 Sherman St, 3rd Floor, Denver, CO 80203
Contract Duration (months): 187 months	Phone Number: [REDACTED]
Contract Amount: \$8M annually in base M&O fees, \$15-\$20M annually in enhancement fees	Email: [REDACTED]
<p>Describe the services provided:</p> <p>The State of Colorado enables county workers to determine Coloradans' eligibility for government assistance programs and disburse food, cash, and medical assistance through the Colorado Benefits Management System (CBMS). CBMS is a large and complex, mission-critical, state-wide integrated eligibility system, similar to CalSAWS. The CBMS solution integrates 300+ applications, 48 of which is a COTS, and interfaces with 38 external systems, 16 of which are real-time. Over 5,000 users access the CBMS solution across over 70 locations. The solution includes multi-tiered processing, including a customer or User facing front-end. Deloitte's CBMS project has a contract value of at least ten million (\$10,000,000) dollars.</p> <p>CBMS is used to determine, issue, and track government benefits to Coloradans based on their eligibility determination. The CBMS solution incorporates Medicaid, Child Health Plan Plus (CHP+), food assistance (SNAP), cash assistance (TANF and Adult Financial), case management for work programs, and benefits recovery functionality.</p> <p>CBMS is a cloud solution that utilizes Salesforce Gov Cloud, Amazon Web Services (AWS), Adobe Experience Manager, and a MuleSoft ESB platform. The system is flexible and robust, currently supporting nearly 5,000 eligibility rule sheets, 800 types of correspondence, approximately 500 portal screens, and nearly 29K batch jobs run monthly. It supports 80+ interfaces with entities including federal agencies like the IRS and Social Security Administration (SSA), supports payment processing through CyberSource, and supports other Colorado and federal systems and agencies. It includes both a worker portal (also named CBMS), a self-service portal called the Program Eligibility and Application Kit (PEAK), two mobile applications, a Chatbot, and other innovative tools like Robotic Process Automation (RPA) and intelligent Character Recognition (iCR).</p>	

Minimum Experience 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.

Minimum Experience Requirements:

- **Application Maintenance**

Deloitte also provides Maintenance and Operations (M&O) 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&O 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.

- **System Modifications**

In Deloitte's role as the prime vendor for CBMS, Deloitte designs, develops, and implements enhancements on a bi-monthly basis for all systems within CBMS. Since Deloitte's enhancements of CBMS began in 2009, Deloitte has implemented over 1M hours' worth of system enhancements to deliver continuous improvements to the CBMS system. In 2021 alone, the team delivered over 200K hours of enhancements. Many of these improvement efforts have become enterprise standards for the State of Colorado.

Results Achieved:

CBMS manages benefit eligibility for nearly one million cases each month, supporting 1.675M Medicaid and CHP+ recipients, 554K SNAP recipients, 32K TANF recipients, and 20K Adult Financial recipients. PEAK currently serves over 3M visitors per year across mobile, desktop, and tablet users. PEAK currently represents between 50% and 65% of new food, cash, and medical assistance benefits received by the state.

Significant achievements as part of Deloitte's engagement with CBMS include the following:

- In 2013, Deloitte converted the PEAK self-service portal from a Java-based solution to a Salesforce-based solution. Deloitte deployed the capability for Medical Assistance applicants on the self-service portal to receive a real-time eligibility determination in support of ACA requirements. [REDACTED]
- In 2014, Deloitte rolled out Executive Dashboards to allow the State's Medicaid agency to monitor KPIs and determine program efficacy in areas like Real Time Application Processing, Medicaid Expansion, and Call Center metrics. After the rollout of the [REDACTED]

Minimum Experience 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.

- Executive Dashboards, [REDACTED] Executives can look at metrics from anywhere, including workstations, laptops, tablets, and mobile devices. It enables executives to make data-backed business decisions based on near-real-time statistics.
- In 2014, Deloitte launched a mobile app for Medicaid recipients in Colorado, and in 2018, Deloitte launched a mobile app for SNAP, TANF, and Adult Financial recipients in Colorado. Combined, these mobile apps have over 85k users and over 2.162M screen views. The Medicaid mobile app has an app rating of 4.7, and the SNAP/TANF/Adult Financial mobile app has an average app rating of 4.0.
 - To take advantage of the latest cloud capabilities, the State of Colorado and Deloitte transformed and migrated the existing Java-based CBMS system to a cloud solution using Salesforce (SFDC) and AWS to improve the efficiency of caseload management, user experience, and ongoing system maintenance challenges. The CBMS Transformation project went live in three distinct phases, beginning in September 2018 and culminating in August 2019.
 - Beginning in fall 2019, Deloitte and the State of Colorado began a human-centered design (HCD) effort to evolve the PEAK user experience to align with the latest design standards and mobile-responsive capabilities. This work included significant user research, including surveys, interviews, and focus groups, across Colorado's 64 counties. The research audience included both citizen user groups that were PEAK users as well as county workers and community partners who support Colorado citizens. This research resulted in several deliverables, including personas, journey maps, research insights, a design prototype, and a roadmap for continued evolution of PEAK. The state and Deloitte are currently executing this roadmap through a series of Agile projects to fully modernize the PEAK experience. This effort will culminate in a modernized application for benefits in June 2023. Since PEAK Modernization began in spring of 2021, PEAK has experienced a 150% increase in overall usage and a 50% increase in mobile visitors. Call center interactions decreased by 70% in the same period.

Minimum Experience ME-F2

Minimum Experience 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 Texas	Contact #1
Company Name: State of Texas Health and Human Services Commission (HHSC)	Contact Name: [REDACTED]
Project Name: Texas Integrated Eligibility Redesign System (TIERS)	Contact Title: TIERS Contract Manager
Contract Date(s): July 28, 2018 – March 21, 2023 + 2 (2-year) extensions	Address: 1609 Center Creek Drive, Austin, TX 78754
Contract Duration (months): 55 months + 48 Months (optional)	Phone Number: [REDACTED]
Contract Amount: \$192M+	Email: [REDACTED]
Project Type (check all that apply): <input checked="" type="checkbox"/> Prime Contractor <input type="checkbox"/> Subcontractor <input checked="" type="checkbox"/> HHS Systems <input type="checkbox"/> Other	
<p>Describe the services provided:</p> <p>Deloitte has worked with Texas HHSC over the past 17 years to design and build the Texas Integrated Eligibility Redesign System (TIERS), a large and complex IT system supporting eligibility/case management of programs similar to CalSAWS. Deloitte's TIERS project contract has a value of at least ten million (\$10,000,000) dollars. The TIERS Solution integrates 9 applications, 9 of which are COTS, and interfaces with 34 external systems, 3 of which are real-time. Over 10k users access TIERS across 889 locations. The solution includes multi-tiered processing, including a customer or user facing front-end.</p> <p>In support of TIERS, Deloitte maintains and enhances an ecosystem of integrated applications, including YourTexasBenefits.com (self-service portal), YourTexasBenefits Mobile (mobile application) and Long-Term Services and Support (LTSS). TIERS was the first Java/JEE integrated eligibility system built in the United States. TIERS revolutionized and streamlined the way HHSC conducts business throughout the State. Since the successful statewide go-live in December 2011, the team has incrementally modernized TIERS by supporting Medicaid modernization under the ACA, adding CHIP eligibility functionality into TIERS and implementing the most downloaded government mobile application in the United States—YourTexasBenefits Mobile. More recently, Deloitte has collaborated with the HHSC to transform software development and maintenance from a Waterfall-based approach to 100% Agile-based delivery.</p>	

Minimum Experience 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.

TIERS is the nation's largest integrated eligibility determination system for Medicaid, SNAP, and TANF benefits. TIERS manages delivery of sixty-four (64) types of assistance, including food, cash, medical, and community care services to Texans in need. Over 10,000 unique users rely on TIERS every day. TIERS automates complex rule-based processing, ensuring consistency in eligibility determinations. Serving more than eight (8) million recipients annually, TIERS is a mission-critical system for HHSC and for the State of Texas.

TIERS Suite of Applications users include:

1. Clients (individuals or families applying for or receiving government assistance, and those helping clients access benefits)
2. Community-Based Organizations (CBOs)
3. Customer Service Representatives (CSRs)
4. HHSC staff and other State of Texas agency staff
5. Trading Partners

Minimum Experience Requirements:

The Deloitte Technical Support Services (TSS) team is responsible for performing software compatibility testing for technology upgrades, capacity planning for the TIERS suite of applications, performance improvements, and performance management.

- **System Engineering**

Texas TIERS is one of the largest integrated eligibility systems in the nation. Over the last couple of years, the TIERS eligibility system was enhanced to improve the user experience of case workers to process the benefits easily in the following ways:

- By enabling schools to directly upload their student records into the HHS system rather than putting the onus on parents to input their child's information to support Pandemic EBT.
- By automatically extending the SNAP certifications to match the Public Health Emergency extension.
- By providing an option to collect citizen data with simplified and fewer questions to answer for benefits issuance.
- Enabled the modernization of the system by:
 - Migrating the application servers from an out-of-support Solaris operating system to a Linux, Oracle 19c upgrade and migrating legacy JAX RPC SOAP services to the REST protocol.

Minimum Experience 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.

- Additionally, improvements were made to citizen-facing applications such as YourTexasBenefits.com by re-designing and re-developing applications to take advantage of lightweight microservice architecture.
 - The mobile version of this application was upgraded to utilize React Native, which provides a near-native experience to users through native module support and standardized UI components.
 - Besides, submitting updates to their applications, citizens can now view their electronic benefits card balances and update their PINs through this app.
- Capacity Planning**

Deloitte prepared the TIERS Capacity Plan by using past and current production performance characteristics. TIERS usage is measured in terms of number of cases and transactions per second. Hardware utilization is measured in terms of processor capacity and storage needs. The capacity model is built by creating a relationship between TIERS Usage (number of cases, transactions per second) against Hardware utilization (processor capacity, storage).

Based on the TIERS application behavior in production, Deloitte analyzed the correlation between processor utilization and transaction rate and the correlation between the number of cases and processor utilization. Deloitte's analysis showed that the processor utilization and storage increase as the number of cases increases and/or the transaction rate increases. These factors are taken into consideration when forecasting future capacity needs. When there are functional or technical changes in the application, load tests are conducted in a production-like environment to determine the impact on capacity. The metrics gathered from these tests will help forecast capacity needs in production.

For batches, the processor utilization is measured during the standard batch window of 8:00 PM to 7:00 AM to determine the optimal capacity required.

The goal is to maintain the agreed-upon SLAs with the client. To meet these SLAs, Deloitte aims to keep the CPU utilization under 50% for the app servers and 85% for the batch servers.

Deloitte also monitors database storage to understand data growth, identify if additional storage is required, and to see if there is a need to do more archival/purging of data to keep the performance within acceptable limits.

• Performance Testing

Online Performance Testing

Minimum Experience 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.

Deloitte conducts online performance tests twice for each release: at the beginning and end of the cycle. This effort simulates a typical production day. Our performance testing scenarios exercise the most frequently used transactions, the most time-consuming transactions, and the business-critical transactions. Deloitte's processes and methodologies also provide the capability to generate bulk data to allow the team to simulate production-like database scenarios during performance test execution.

The online performance tests are conducted using the MicroFocus LoadRunner tool as an automated testing tool, replicating the same scenario that was used to determine the baseline. Integrated performance testing and system tuning, with collaboration and final approval from HHS, determines the acceptable performance baseline to be measured against in subsequent releases. Throughput, transaction rate, error rate, CPU utilization, and errors/exceptions are all analyzed during and after the test.

Batch Performance Testing

Through batch performance testing, Deloitte validates that the system can handle the production batch load and complete the batch processing during the allocated period. Batch testing is conducted in an environment that closely simulates production behavior. The entire cut-off schedule, which includes over 200 batches, is executed as part of this test cycle. Results are compared to the baseline numbers in the same environment. In addition, any other batches that may have been added or modified for the release are included in the test cycle.

Monitoring and Analysis

Deloitte has created several Splunk and Dynatrace dashboards to monitor the performance tests. These dashboards provide immediate feedback during the test with respect to response times, transaction volumes, and exceptions. Deloitte's custom performance instrumentation is also leveraged to monitor the application performance and system performance during and after the performance test. Performance Center and Vugen Analysis tools are also utilized to identify potential performance bottlenecks and diagnose the root cause of performance problems.

Besides tools such as Splunk and Dynatrace, database-level monitoring is achieved using standard distributed tools such as AWR (Oracle). The custom performance instrumentation, which has been built into the code through the TIERS framework, allows us to trace the response time of any individual page at any point of time.

Load and Stress Testing Metrics Reporting

Forming an accurate picture of the system performance is crucial to facilitating successful testing. It ultimately contributes to informed business decision-making. Excel dashboards are utilized to deliver the performance results immediately after the test is

Minimum Experience 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.

completed. Deloitte provides a consistent set of data that communicates clearly and concisely the current performance of the system.

- **Performance Monitoring**

Deloitte conducts continuous performance monitoring to track system performance and utilization, confirm system effectiveness and efficiency, and identify improvement opportunities. Continuous performance monitoring is achieved through near-real-time dashboards that provide immediate insight into how the system is performing at any particular point in time. Alerts are sent immediately when any issues are discovered. Daily, weekly, and monthly status reports track historic data. They also help us to identify trends in performance and come up with ideas to further improve performance. Daily batch timings are reviewed, and the longest-running jobs are tuned for performance in a continuous manner, making for a scalable, high-performing batch system.

- **Batch Processing**

Deloitte's batch approach leverages our custom-built batch framework and is fitted to TIERS' intricate needs and requirements. It uses proven operational and management procedures to define, document, and perform batch operations, configuration management, database management, and other batch-related activities. This is critical to maintaining the availability, performance, and functional delivery necessary to meet the state's business operations, goals, and objectives.

Batch Scheduling

To support scheduling, we use critical path analysis to determine the pertinent jobs with the greatest impact on the batch window. Critical path jobs are a set of jobs that must be completed before the system can be brought back up and made available. The intensive scheduling and logging are automated and run during the state-approved batch window to avoid any impact to worker operations during the day.

Batch Monitoring and Maintenance

Deloitte analyzes several factors for successful batch management, such as frequency, inbound/outbound file count, estimated record count, and estimated run time. This analysis allows Deloitte to identify jobs that are dependent upon one another and that can run in parallel, providing the foresight to account for a margin of error and its solution within the designated batch window. Deloitte's custom-built batch framework and custom-built batch dashboard tool allow us to build a complete picture of the batch cycle. These logging utilities allow us to collectively identify bottlenecks or risk during the scheduled batch cycle.

Minimum Experience 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.

Results Achieved:

Together, Deloitte and HHSC have achieved tremendous successes on the TIERS program. Key outcomes and accomplishments are listed below:

- Deloitte is effectively meeting all SLAs, allowing workers to manage the application and case management processes effectively and efficiently for the public assistance programs administered.
- By implementing custom instrumentation based on Java AOP, we are now able to capture performance metrics at granular levels. This information has helped us with identifying focused areas for performance optimizations.
- Our capacity modeling has enabled us to support special programs introduced to aid Texas citizens during the pandemic such as Pandemic Electronic Benefit Transfer (P-EBT).
- TIERS is a fully-integrated eligibility system comprised of over 9 different applications where development occurs concurrently across 25 scrum teams. Deloitte has expertise in managing this complex system that has over 50 interconnected systems.

Project #2	Contact #2
Company Name: Michigan Department of Technology, Management, and Budget (DTMB)	Contact Name: [REDACTED]
Project Name: Bridges M&O Project	Contact Title: Business Relationship Manager/ Div. Director Eligibility Area
Contract Date(s): February 11, 2017 – February 10, 2025	Address: 235 South Grand Ave, Lansing, MI 48933
Contract Duration (months): 96 months	Phone Number: [REDACTED]
Contract Amount: \$280M	Email: [REDACTED]

Describe the services provided:

Through the Bridges M&O project with a **contract value greater than ten million (\$10,000,000) dollars**, Deloitte provides Michigan technical configuration management support, incident management, enhancements, and 24x7x365 system management and support of MI Bridges—the state's Eligibility and Enrollment system—that Deloitte and Michigan implemented in 2007. The Bridges **solution integrates 5 applications, 3 of which is COTS, and interfaces with 20+ external systems, 5 of which are real-time**. The Bridges solution **includes multi-tiered processing, including a customer or user facing front-end**.

Minimum Experience 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.

Deloitte delivers application enhancements, Maintenance and Operations (M&O), post implementation and production support of MI Bridges, the enterprise service bus (Michigan HUB), and the Integrated Service Delivery Portal, a self-service portal for clients. MI Bridges is a large and complex IT system supporting eligibility/case management of programs similar to CalSAWS. It supports **10,000 users located in 126 field offices** to determine eligibility and benefit amounts for 55 types of federal and state assistance and serves 2.5 million clients in over 1.5 million cases across 83 counties in Michigan. Bridges supports intake, eligibility, administration of core social services programs that includes Food Assistance (SNAP), Cash Assistance, Child Development Care (CDC), State Emergency Assistance, Medicaid, and CHIP.

Minimum Experience Requirements:

- **System Engineering**
Enhanced the Worker portal system which provides application processing and case management support functions across multiple health and human services programs by introducing Universal Caseload management approach for Case processing. This includes introducing technology enablers to increase user capabilities, improve user engagement, streamlining business processes by task based, promotes reuse, and increasing throughput/speed in operational activities for workers.
- **Capacity Planning**
Deloitte has collaborated with the state to assess the current production capacity and plan for anticipated growth with changes to the system functionality for meeting the current and future demand. Periodically Deloitte and the state team members also review, assess, and adjust the resources as needed to maintain the system up time and better user experience.
- **Performance Testing**
Deloitte provides support to implement performance testing activities in collaboration with the Department of Technology, Management & Budget (DTMB)/TCO for identified functionalities to verify, examine and implement changes for any tuning opportunities.
- **Performance Monitoring**
Deloitte team proactively monitors the performance of the system at various levels such as application performance, Database performance and batch performance. Additionally, Deloitte team collaborates and collects data in collaboration with the state monitoring team to then proactively identify trends and tuning opportunities which are prioritized and addressed timely for maintaining system stability and high availability.

Minimum Experience 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.

- **Batch Processing**

Deloitte supports the planning and execution of batch processing in collaboration with the state's technical team (DTMB). This includes supporting scheduling and assisting in monitoring batch runs to avoid business disruption; and review batch schedules and reports to make recommendations for improving efficiency and streamlining performance.

Results Achieved:

The Deloitte team's consistent high-quality work delivers uninterrupted service for the residents of Michigan and successful delivery of mission-critical projects, navigating complexities to mitigate risk and achieve shared objectives. Similar to the goals of DCF, Michigan achieved the following results:

- [REDACTED]
- Created configurable workflows for intuitive data management by collecting and viewing pertinent data as needed.
- 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.
- Implemented an Electronic Document Management (EDM) system enabling clients and workers to upload documents, including applications and verifications, into an electronic case file, which stays with the case.

Minimum Experience ME-F3

Minimum Experience ME-F3	
Prime Contractor experience with a minimum of one (1) large and complex IT System Project involving a minimum of three Contractors with responsibility for different areas of the system. The Project(s) must have been completed or ongoing within the last ten (10) years.	
Project #1	Contact #1
Company Name: Tennessee TennCare	Contact Name: [REDACTED]
Project Name: Tennessee Eligibility Determination System (TEDS)	Contact Title: Chief Information Officer
Contract Date(s): December 03, 2016 – September 30, 2023	Address: 310 Great Circle Road, Nashville, TN 37228
Contract Duration (months): 81 months	Phone Number: [REDACTED]
Contract Amount: \$64M for DDI and \$29.5M per O&M year	Email: [REDACTED]
<p>Describe the services provided:</p> <p>TennCare is the State of Tennessee's managed Medicaid agency and serves more than 1.8 million Tennesseans, including low-income individuals such as pregnant women, children, caretaker relatives of young children and older adults and adults with disabilities, helping them improve lives through high-quality, cost-effective care. Deloitte was the primary system integrator in building the new cloud-based Tennessee Medicaid Eligibility System (TEDS) solution tailored to Tennessee Medicaid policy, with a contract value greater than ten million (\$10,000,000) dollars. TEDS is a large and complex IT system that automates Medicaid eligibility determination for all Tennessee Medical Assistance programs through a streamlined, all-in-one benefits eligibility web portal. The TEDS solution is accessed by 563k+ of users at multiple locations. Currently TEDS has a clearly defined AWS-based cloud reference architecture with managed, enterprise shared, and application environments specific to virtual private cloud networks. TennCare has provisioned over 570 servers across 40 virtual private cloud/sub-networks, hosting 70+ application environments supporting more than 6 production applications, 75+ COTS and other third-party-managed supporting services. The solution interfaces with 11 systems, including 75+ real time services. The solution includes multi-tiered processing, including a user front-end optimized for multiple user interface platforms.</p> <p>TEDS automates Medicaid Eligibility determination for all TN Medical Assistance programs through a streamlined, all-in-one benefits eligibility web portal. Core functions include electronic document management, intake, recertification, appeals, case management, and eligibility determination. It went live in May 2019, provides with several capabilities including, citizen self-service portal, TennCare worker portal, member notifications over mail, paper or SMS, integration with several state/federal interfaces for auto-verification and information gathering, and various CMS and state reports. The system determines Medicaid eligibility for the citizens of Tennessee and interfaces with MMIS to transfer the medical eligibility data of the citizens.</p>	

Minimum Experience ME-F3

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

Minimum Experience Requirements:

- **Contractors with responsibility for different areas of the system**

TennCare is multi-stakeholder support environment and we have worked in collaboration with all the contractors by playing the Service and Portfolio Management Office (SPMO) and Systems Integrator role and also defining and mutually agreeing on trading partner agreements with these vendors. In addition to Deloitte, TennCare is **supported by more than seven contractors**, including 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 (Master Data Management (MDM) operations management) and several other strategic partners in multiple areas and we have led and defined guidelines in enabling these entities work together to support the mission of TennCare.

Deloitte is key and instrumental in defining the cloud strategy and establishing the cloud-based infrastructure for TennCare from the beginning of the Cloud Managed Services Project. The Cloud Managed Services adoption is more than just a technology transformation. To move to the cloud effectively, the Division of TennCare used the Deloitte's reference architecture and Cloud Adoption Framework and its key perspectives (business, people, governance, platform, security, and operations) to ensure a comprehensive view of the transformation. Deloitte's core cross-functional team with cloud engineering, operational support, and security and compliance capabilities was formed and initiated the project journey for Cloud Managed Services in 2019. Some of the key responsibilities include:

- Creation of cloud governance (reporting, cost optimization, and enterprise vision).
- Establish enterprise reference architecture (consistent Application Centric Infrastructure [ACI] based virtual private clouds and subnets for various application environments).
- Set up continuous and standard operational processes (built, configured, and monitored in standard methodology).
- Enable a compliant cloud-based ecosystem (Such as MARS-E 2.2, FedRamp, and IRS Publication 1075).
- Maintain and operate the six production applications (such as IAM, Medical Appeals, Member and Partner Portals for eligibility and long-term social services, digital contact center) in TennCare's AWS cloud infrastructure including the management of operating system patching of all Ec2 servers, vulnerability mitigation for both the servers and Commercial-Off-The-Shelf (COTS) tools.
- Provide network engineering and support the compliant connectivity between various application environments migration and optimization to an AWS Cloud environment.

Minimum Experience ME-F3

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

Results Achieved:

Over the past three years, Deloitte has achieved many notable outcomes across the TEDS/TennCare Project including:

- Successfully implemented TEDS system in May 2019 and continued to provide maintenance and operations services post go live, by working with multiple vendors supporting different aspects of production system.
- Provided support in the following areas: program management, application management, technical operations, security operations, application enhancement, information management, operation team support, organizational change management, training and communications, readiness support, and post go-live implementation support.
- Automated several worker processes so that the workers can spend time on tasks that really need their attention. Several critical processes such as application processing, change/renewal processing, verification against state/third-party/federal interfaces, actions on untimely member responses have been automated to increase worker productivity and improve workload.
- Provisioned application environments and the needed infrastructure across different virtual private cloud/sub-networks for hosting various cloud-based application environments, and other enterprise and shared managed support services.
- Established Direct Connect over a dedicated network circuit between the states on-premises data centers and TennCare Cloud's network.
- Reduced application environment setup time from 6-8 months to 2-3 weeks with all processes and cloud design package approvals.
- Proactively identified and fixed issues before they resulted in service degradation or an unplanned outage which enabled the system to exceed enrollment forecasts.
- Conducted 10+ major cloud Disaster & Recovery tests that incorporated 30+ different applications and supported COTS components across cloud and on-prem infrastructure, ensuring preparedness for any breaches or security threats.
- Implemented a savings plan for all AWS Cloud infrastructure that saved the State an additional ~\$250,000+ in computer resources costs year over year.
- Provided seamless integration experiences for the citizen by integrating with TN's Identity Access Management (IAM) platform that enables users to securely authenticate with just one set of credentials, creating a coherent, enterprise-wide user experience.
- Received National Association of State Chief Information Officers (NASCIO) award for efficiently managed Enterprise IT project for 2022.

Minimum Experience ME-F3	
Prime Contractor experience with a minimum of one (1) large and complex IT System Project involving a minimum of three Contractors with responsibility for different areas of the system. The Project(s) must have been completed or ongoing within the last ten (10) years.	
Project #2	Contact #2
Company Name: Commonwealth of Pennsylvania	Contact Name: [REDACTED]
Project Name: Client Information System (CIS)	Contact Title: Director, Bureau of Program Support
Contract Date(s): April 23, 2012 – June 30, 2027	Address: 431 Health & Welfare Building, Harrisburg, PA 17120
Contract Duration (months): 182 months	Phone Number: [REDACTED]
Contract Amount: \$500M+	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Deloitte has actively partnered with the Pennsylvania Department of Human Services (PA DHS) since 1978, providing services including application design, development, maintenance, change leadership, field support, training services, strategic planning, and business IT strategy. Core to our services is maintenance and operation of the Client Information System (CIS) suite, the backbone for the Department and supports case processing, determines eligibility, authorizes services, and distributes benefits to more than 3.7 million Pennsylvanians. CIS is a large and complex IT system project involving more than three contractors. Deloitte's Client Information System contract value is greater than ten million (\$10,000,000) dollars.</p> <p>CIS is a large and complex IT system supporting eligibility/case management of programs similar to CalSAWS. It supports approximately 8,000 users (i.e., 7,000 workers and 1,000 providers) at over 100 separate locations including the 102 county/district offices. The CIS solution integrates 6 applications, 5 of which is a COTS, and interfaces with 32+ external systems, at least one 14 of which is real-time. The system includes multi-tiered processing, including a customer or user facing front end.</p> <p>Each fiscal year, DHS uses CIS to provide over \$15.3B in services through TANF, food stamps (FS or SNAP), LIHEAP, State Blind Pension (SBP), Medical Assistance (MA), LTC, and supplements to basic Supplemental Security Income (SSI) grants. It interfaces with more than 100 entities for information matching, and it is the key automation vehicle for the County Assistance Offices (CAOs) in delivering 7 programs and services. The CIS suite of systems primarily involves four business-critical applications that have been incrementally implemented.</p> <ul style="list-style-type: none"> • COMPASS: Serves as the self-service portal for residents for five Commonwealth agencies programs. Its human-centric design allows residents to update their user accounts, enter case changes, renew benefits, and view benefit summaries. The device agnostic, user-facing portal COMPASS enables 342,000 mobile app sessions monthly and supports 1 million active individual users through the mobile and web browsers. 	

Minimum Experience ME-F3

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

- **CIS Mainframe:** Serves as the system of for eligibility, which drives the eligibility determination, benefit calculation, and benefit issuance processes.
- **CAPS Caseworker Web Portal:** Provides application processing and eligibility determination functionalities for eight authorized CHIP Managed Care Organizations (MCOs) to process new CHIP applications, renewals, and change reports. Key functionalities include application entry, eligibility determination, application maintenance, and eligibility management.
- **eCIS Worker Web Portal:** A web-based system used by income maintenance, clerical, and caseworker staff to manage daily operations by providing its users with a single location and user experience to efficiently execute a multitude of tasks. eCIS ensures data quality and availability by enabling income maintenance workers to complete functions like processing application intake data, real-time benefit eligibility determination, generating dynamic client notices with a roll-up of client outcomes, scanning and storing verification documentation in an electronic format, viewing results of federal and state data exchanges, and tracking and managing workload assignments across staff.

Minimum Experience Requirements:

- **Contractors with responsibilities for different areas of the system**
Deloitte collaborates across a multi-vendor and multi-system ecosystem to successfully deliver PA DHS programs. We have demonstrated the ability to navigate the landscape of business partners, vendors, and external stakeholders necessary for sustained project delivery and reduction of risk. The Deloitte team works with vendors and business partners 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, partners, and vendors.

Results Achieved:

- Our efforts continue to reduce reliance on the legacy mainframe infrastructure and improve modularity, scalability, and reduce maintenance costs. Because of the scalability of the solutions, over time these initiatives have included critical updates for the CIS suite of system. We maintain over 34 million lines of code, 4,900+ reports and 2,500+ batch jobs to successfully deliver benefits to Commonwealth citizens and support technical upgrades to keep the core business systems operating.

Minimum Experience ME-F4

Minimum Experience 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	Contact #1
Company Name: State of California, Office of Systems Integration (OSI)	Contact Name: [REDACTED]
Project Name: California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)	Contact Title: CalHEERS Project Director
Contract Date(s): September 9, 2019 – June 20, 2024	Address: 2329 Gateway Oaks, Suite 100, Sacramento, CA 95833
Contract Duration (months): 57 months	Phone Number: [REDACTED]
Contract Amount: \$485M+	Email: [REDACTED]
Describe the services provided:	
<p><u>Description of Services Provided:</u></p> <p>Deloitte is the Maintenance and Operations integrator for the State of California's Healthcare Eligibility, Enrollment, and Retention System (CalHEERS). CalHEERS is a large and complex IT system supporting Health Care in California. It was successfully transitioned from the incumbent vendor in September 2019, within the past 10 years. CalHEERS is a large public-facing system supporting over 7.7 million total user accounts across multiple locations with high availability standards requiring coordination with multiple organizations, teams, and stakeholders in a complex ecosystem and delivers high quality, affordable health insurance for millions of Californians. The CalHEERS solution integrates 10 applications, including 2 COTS, and interfaces with 41 external systems, including 30 of which are real-time. CalHEERS features multi-tiered processing, including a customer or User facing front-end.</p> <p>Through the CalHEERS Project contract with a value exceeding ten million (10,000,000) dollars, Deloitte provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications. Deloitte is tasked with implementation of accelerated modernization programs, including the migration and optimization to an AWS Cloud environment, delivery model transformation (Agile/DevOps), and workforce transformation.</p> <p>CalHEERS is the largest state-based health insurance exchange delivering high quality, affordable health insurance that is available to more than 40 million Californians. CalHEERS is a large, complex, state-based health exchange hosted on the AWS cloud that has an open data lake architecture utilizing Databricks and Snowflake. The system consists of over 450-terabyte production databases, six petabytes of federally mandated archived data, and more than 20,000 internal staff accounts and 7.7 million user accounts.</p>	

Minimum Experience 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.

CalHEERS exchanges data using more than 140 interface services across 41 interface partners at the state, federal, and commercial levels in Production and Non-Production environments.

Minimum Experience Requirements:

- **System Transition**

The Deloitte team **transitioned the system** from the incumbent vendor during the COVID-19 pandemic in nine months with 100 percent availability and no disruption to stakeholders, plan members, and consumers. To prepare for the transition, Deloitte conducted dozens of activities including more than facilitating 350 knowledge transfer sessions and reviewing thousands of current state documents. To support a successful transition, Deloitte hired seasoned experts to support a one-year transition between the incumbent vendor and its team, including both key staff who functioned in a leadership capacity and experience team members with expertise across all technology domains. Since assuming systems operations, Deloitte has designed, built, and deployed over 100 change requests since April 2020. CalHEERS requires new functionality development while simultaneously maintaining the solution's current operations. Deloitte implemented multiple new functionality enhancements enabling and expanding Special Enrollment Period for COVID-19 impacted individuals to apply for subsidized health coverage.

Results Achieved:

- Deloitte has met 100 percent of the contract SLAs (19 in total) from the contract effective start date of SLAs in May 2020 to present. SLA categories include system performance, system availability, incident response time, and batch processing timeliness.

Project #2	Contact #2
Company Name: Arkansas	Contact Name: [REDACTED]
Project Name: Arkansas DHS Information Support Services (ISS)	Contact Title: Chief Information Officer
Contract Date(s): September 01, 2017 – August 31, 2024	Address: 700 Main Street, Little Rock, AR 72201
Contract Duration (months): 84 months	Phone Number: [REDACTED]
Contract Amount: \$169M	Email: [REDACTED]

Describe the services provided:

Through a competitive procurement **with a contract value exceeding ten million (\$10,000,000) dollars**, the Arkansas Department of Human Services (DHS) selected Deloitte as the Maintenance and Operations vendor for their entire **eligibility and enrollment** application portfolio. The Arkansas Integrated Eligibility System (ARIES) is a **large and complex IT system that integrates 137+**

Minimum Experience 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.

applications, 5 of which is a COTS, and interfaces with 26 external systems, all of which are real-time. The solution is accessed by 6k+ users at 90+ locations. The ARIES system includes multi-tiered processing, including a customer or user facing front-end.

Deloitte replaced the incumbent vendor, who managed the DHS portfolio for more than 20 years. Deloitte assumed maintenance and operation of the Arkansas legacy eligibility systems in 2017 and was able to **transition ownership** from the incumbent vendor within three months. After transitioning in, Deloitte worked with Arkansas to develop a retirement approach for the legacy system. This resulted in the implementation of the modernized ARIES system in December 2020. Deloitte was the primary system integrator vendor who worked with DHS to plan, design, develop, test, and implement the system on a cloud-based platform. Deloitte continues maintain and operate ARIES.

The Arkansas DHS strives to protect and improve the health and well-being of Arkansans. DHS has over 20 sub-agencies that provide services to 1.2 million Arkansas residents. The scope of maintenance and enhancements includes over 167 human services applications, including the legacy eligibility and enrollment system.

Minimum Experience Requirements:

- **System Transition**

Deloitte conducted a four-month transition with the incumbent vendor, DHS business application owners, and other technical support teams. A transition plan was established, which included knowledge transfer sessions to discuss and document business processes, interface and batch schedules and processes, review the application code, and assess the system health of each application. In addition to knowledge transfer sessions, we participated in shadowing exercises with the incumbent vendor to gain hands-on experience of current process and procedures to establish a smooth and uninterrupted maintenance and operations go live at the end of the four months. During this successful transition, the team completed the following:

- 294 transition meetings conducted
- 137 applications covered
- 100+ interviews conducted
- 87+ staff onboarded
- 1,100+ action items completed
- 13 major risks mitigated

The transition was completed within the four-month timeframe, and M&O go-live began on the planned date. Weekly transition status reports were submitted to DHS to provide continuous updates of the transition and track action items, risks, and issues.

Minimum Experience 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.

Results Achieved:

With the successful implementation of ARIES, Deloitte and the State teams have been able to achieve the following outcomes in the last 20 months.

- 100 percent of the population on Medicaid, SNAP and CASH programs has been successfully converted to ARIES.
- 2,500+ users access ARIES, making it a statewide work queue implementation for all staff.
- ARIES issues over \$270 million SNAP issuances and more than \$500,000 CASH issuances annually.
- More than 3.2 million clients are maintained in ARIES' Enterprise Master Customer Index (MCI). This acts as the primary client master index which is used across agencies in the State of Arkansas.
- [REDACTED]

ATTACHMENT B9 – M&E FIRM REFERENCE FORM

Attachment B9 contains our two (2) firm references for Deloitte.

Attachment B9 Table of Contents

Reference #1 – TennCare: Cloud Managed Services Contract.....	2
Reference #2 – State of California, Office of Systems Integration – CalHEERS.....	6

Reference #1 – TennCare: Cloud Managed Services Contract

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ATTACHMENT B9 – M&E FIRM REFERENCE FORM

Directions:

Provide two (2) Firm References for the Prime Contractor from the Projects listed in Attachment B8 – M&E Firm Qualifications. Each Firm Reference must clearly identify the firm.

The Firm references must be submitted within the Business Proposal as defined within RFP Section 6 - Proposal Structure and Submission.

FIRM REFERENCE: DELOITTE CONSULTING LLP	
Reference Agency Name: TennCare	
Project Name: Cloud Managed Services Contract	
Contact Person/Title: [REDACTED]	[REDACTED]
Address: 310 Great Circle Road, Nashville, Tennessee 37228	
<p>Description of Services Provided:</p> <p>Deloitte was the prime contractor to build the new cloud-based Tennessee Medicaid Eligibility System (TEDS) solution tailored to Tennessee Medicaid. As a large and complex IT system, TEDS automates Medicaid Eligibility determination for all TN Medical Assistance programs through a streamlined, all-in-one benefits eligibility web portal. Core functions include electronic document management, intake, recertification, appeals, case management, and eligibility determination.</p> <p>TennCare is the state of Tennessee's managed Medicaid agency and serves more than 1.8 million Tennesseans including low-income individuals such as pregnant women, children, caretaker relatives of young children and older adults and adults with disabilities helping them improve lives through high-quality, cost-effective care. TEDS went live in November 2018 and provides several capabilities including, citizen self-service portal, TennCare worker portal, member notifications over mail, paper or SMS, integration with several state/federal interfaces for auto-verification and information gathering, and various CMS and state reports. The system determines Medicaid eligibility for the citizens of TN and interfaces with MMIS (Medicaid Management Information system) to transfer the medical eligibility data of the citizens.</p> <p>TennCare is multi-stakeholder support environment and we have worked in collaboration with all the vendors by playing SPMO and Systems Integrator role and also defining and mutually agreeing on trading partner agreements with these vendors. Deloitte was the primary system integrator to build the new cloud-based Tennessee Medicaid Eligibility System (TEDS) solution tailored to Tennessee Medicaid policy. In addition to the Deloitte team, TennCare is supported by more than 3</p>	

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FIRM REFERENCE: DELOITTE CONSULTING LLP

contractors including 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 partners in multiple areas and we have led and defined guidelines in enabling these entities work together to support the mission of TennCare.

Deloitte is key and instrumental in defining the cloud strategy and establishing the Cloud based infrastructure for TennCare from the beginning of the Cloud Managed Services Project. The Cloud Managed Services adoption is more than just a technology transformation. To move to the cloud effectively, the Division of TennCare used the Deloitte's reference architecture and Cloud Adoption Framework (CAF) and its key perspectives (business, people, governance, platform, security, and operations) to ensure a comprehensive view of the transformation. Deloitte's core cross-functional team with cloud engineering, operational support and security & compliance capabilities was formed and initiated the project journey for Cloud Managed Services in 2019. Cloud-based operational activities included network engineering, cybersecurity vulnerability mitigations, capacity planning, performance testing, and performance monitoring.

Reference Questions: For each question below, please provide a comment.

1. Did the Contractor produce high quality, Deliverables? Please describe briefly.

Yes.

Cloud infrastructure reference architecture, operating model, application Cloud design packages followed the TennCare standards and are produced high quality deliverables or work products.

2. Was the Contractor flexible and willing to work through issues during all stages of the Project?

Yes,

Deloitte worked with TennCare and other vendors/partners involved to resolve all issues related to Cloud Managed Services Project.

CALSAWS M&O SERVICES RFP #01-2022
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Reference Questions: For each question below, please provide a comment.

3. Was communication between the Contractor and your organization's Staff open, timely, complete and effective? Please briefly summarize.

Yes, Deloitte has done a great job to provide timely status update, escalate issues/risk, provided mitigation approach, and worked with our staff to complete the project on time and with high quality.

4. Were there any major issues with Key Staff turnover or replacement?

No issues.

5. Were any Subcontractors used by this Contractor? If so, for what purpose/major tasks? How well did the Contractor manage its Subcontractors and did your organization ever have to mediate?

Very limited number of sub-contractors are involved to support Cloud Managed Services project in reference Architecture Setup, Cloud based application development, testing and infrastructure activities.

All subcontractor staff were managed effectively, without any involvement required from TennCare.

6. Was the Project a success?

Yes. We were able to grow into 6 production applications, 72+ environments and 500+ servers in designed VPCs in 3+ years. Our TennCare Cloud Managed Services project is awarded at NASCIO for one the best managed Enterprise IT management project.

CALSAWS M&O SERVICES RFP #01-2022
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Reference Questions: For each question below, please provide a comment.

7. Would you rehire/recommend this Contractor? If not, why not?

Yes.

8. On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this Contractor's overall performance?

10

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES

The undersigned hereby certifies that the foregoing statements are true and correct.

Print Name

Title

Date

Signature

10/18/2022

Reference #2 – State of California, Office of Systems Integration – CalHEERS

DocuSign Envelope ID: 302EF76B-4E83-4005-8583-1228FEE590EF

CALSAWS M&O SERVICES RFP #01-2022
Volume 1B – M&E Business Proposal

ATTACHMENT B9 – M&E FIRM REFERENCE FORM

Directions:

Provide two (2) Firm References for the Prime Contractor from the Projects listed in Attachment B8 – M&E Firm Qualifications. Each Firm Reference must clearly identify the firm.

The Firm references must be submitted within the Business Proposal as defined within RFP Section 6 - Proposal Structure and Submission.

FIRM REFERENCE: DELOITTE CONSULTING LLP	
Reference Agency Name: State of California, Office of Systems Integration (OSI)	
Project Name: California's Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)	
Contact Person/Title: [REDACTED]	Phone: [REDACTED]
Address: 2329 Gateway Oaks, Suite 100, Sacramento, California 95833	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Deloitte serves as Prime Contractor for the State of California's Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) infrastructure, maintenance, and operations services, after successfully transitioning from the incumbent vendor in September 2019. CalHEERS is a large, complex, state-based health exchange hosted on the AWS cloud that has an open data lake architecture utilizing Databricks and Snowflake. Deloitte provides enhancements, security, maintenance, subcontractor, and product vendor management (i.e., more than 3 contractors/vendors), helpdesk support, and ongoing operations of core applications for the cloud-based system.</p> <p>Deloitte transitioned the cloud-based system from the incumbent vendor during the COVID-19 pandemic in nine months with 100% availability and no disruption to stakeholders, plan members, and consumers. To prepare for the transition, Deloitte conducted dozens of activities including more than facilitating 350 knowledge transfer sessions and reviewing thousands of current state documents. Since assuming systems operations, Deloitte has designed, built, and deployed over 100 change requests since April 2020.</p>	

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CALSAWS M&O SERVICES RFP #01-2022
Volume 1B – M&E Business Proposal

Reference Questions: For each question below, please provide a comment.

1. Did the Contractor produce high quality, Deliverables? Please describe briefly.

Yes.

Deloitte completed the cloud-based system transition on schedule with 100% availability and no disruption to stakeholders, plan members, and consumers. Deloitte Conducted more than 350 knowledge transfer sessions, reviewed thousands of current state documents, and performed dozens of other activities to prepare for successful transition. Deloitte Hired seasoned experts to support a one-year transition between the incumbent SI and its team, including both Key Staff who functioned in a leadership capacity and experienced team members with expertise across all technology domains.

Deloitte has met 100 percent of the contract SLAs (19 in total) from the contract effective start date of SLAs in May 2020 to present. SLA categories include system performance, system availability, incident response time, and batch processing timeliness.

2. Was the Contractor flexible and willing to work through issues during all stages of the Project?

Yes.

3. Was communication between the Contractor and your organization's Staff open, timely, complete, and effective? Please briefly summarize.

Yes.

Deloitte works closely with the State to identify opportunities to enhance the project governance structure and improve transparency and coordination with CalHEERS Sponsors and stakeholders to maintain open, timely, complete, and effective communication.

4. Were there any major issues with Key Staff turnover or replacement?

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CALSAWS M&O SERVICES RFP #01-2022

Volume 1B – M&E Business Proposal

Reference Questions: For each question below, please provide a comment.

No, there were not any issues with Key Staff turnover or replacement.

5. Were any Subcontractors used by this Contractor? If so, for what purpose/major tasks? How well did the Contractor manage its Subcontractors and did your organization ever have to mediate?

Deloitte managed several Subcontractors including: KP Corp. served as print vendor; GetInsured served as one of the COTS software vendors; NTT served as on-prem hosting services provider; Amazon Web Services (AWS) served as cloud hosting services provider.

Deloitte has worked well to manage its Subcontractors to meet and exceed all SLAs. Because of this success and there have been no issues, our organization has not mediated. Specifically, Deloitte worked with KP Corp. to meet all Printing and Imaging SLAs; Deloitte worked with NTT and AWS to meet all System Availability SLAs; Deloitte worked with the COTS vendor to meet and exceed defect fix timeliness SLAs.

6. Was the Project a success?

Yes.

Deloitte's experience with CalHEERS demonstrates an ability to transition, operate, and enhance a complex high-volume healthcare transaction platform running in an AWS cloud environment. During the annual Open Enrollment (OE) period, millions of Californians and hundreds of administrators and enrollers use the platform to facilitate eligibility determination and shop for health plans, resulting in over 36,000 average daily users with over 55 million average daily system transactions. In addition to a transactional platform, CalHEERS is also an analytical platform that interfaces with multiple systems to exchange data and enables analytics to support decision-making, market analyses, and program integrity (e.g., consumer eligibility for coverage).

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CALSAWS M&O SERVICES RFP #01-2022
Volume 1B – M&E Business Proposal

Reference Questions: For each question below, please provide a comment.

7. Would you rehire/recommend this Contractor? If not, why not?

Yes, I would rehire/recommend this contractor.

8. On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this Contractor's overall performance?

10

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES

The undersigned hereby certifies that the foregoing statements are true and correct.

Print Name

Title

Date

Signature

12/28/2022

DocuSigned by:

(F92DACC-90624A0...

ATTACHMENT B10 – MAINTENANCE AND ENHANCEMENTS KEY STAFF RESUMES/STAFF QUALIFICATIONS

Attachment B10 contains our Maintenance and Enhancements (M&E) Key Staff Resumes/Qualifications, Parts 1 and 2, in the format as provided by the RFP.

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1.1 M&E Project Manager, Rakesh Duttgupta

M&E PROJECT MANAGER			
PART 1 – RÉSUMÉ			
Contractor	Deloitte Consulting LLP		
Candidate Name	Rakesh Duttgupta		
Position in the Company	Principal	Length of Time in Position	9 years, 5 months Overall time at company (21 years, 6 months)
Project Position & Responsibilities	<p>As the M&E Project Manager, Rakesh is responsible for providing day-to-day management of Contractor resources and activities, including overall performance and agreement compliance. The M&E Project Manager will act as the primary interface with the Executive Director and Consortium Management Team. The M&E Project Manager will confirm that Contractor resources possess the appropriate skills and experience necessary to fulfil the responsibilities of the Agreement and are available throughout the life of the Agreement. The duties and responsibilities of the M&E Project Manager include: Being responsible for the execution and overall management of the contract and the Contractor's Team; Engaging with the Consortium Management Team on a daily basis to confirm the Project receives required Consortium commitment and support; Proactively collaborates and coordinates with other Consortium CalSAWS contractors; Possessing signature authority to commit the Contractor to CalSAWS Contracts, Amendments and Change Notices with the Consortium; Communicating and reporting on Project progress, risks, and issues on an ongoing basis; Acting as a liaison with the Consortium Executive Director to confirm Consortium expectations are met; Providing executive level reporting and communications to Consortium Management, the Executive Director, Joint Powers Authority (JPA) Board of Directors, Project Steering Committee, State program sponsors and other stakeholders; Prepare special reports and presentations related to the Project; Working cooperatively with the Consortium PMO to resolve escalated issues including, but not limited to, contractual requirements, risk mitigation, CalSAWS enhancements, and any other issue that requires executive management attention; Identifying and bring forward technology options and innovation recommendations that will provide the highest value to the Consortium and county business operations; Working with the Contractor's Technical Manager, Innovations Manager, Enterprise Architect, the Consortium Management Team, to lead an annual strategic planning initiative focused on technology improvements.</p>		
Skills & Qualifications for Project Position	<p>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.</p>		

M&E PROJECT MANAGER					
Relevant Experience (Add additional tables as needed)					
Project Title	State of Wyoming, Wyoming Department of Health – Wyoming Eligibility System (WES)				
Position Title	Contractor Manager/Project Executive (Director)				
Begin Date	07/11/2016	End Date	Present	# of Months	77
Scope and Description of Responsibility	The scope of the Wyoming Department of Health - WES project is to architect, design, develop, test, operate, and maintain the eligibility system. WES is a web-based Integrated Eligibility solution that administers benefits for the Medicaid and Children's Health Insurance (CHIP) programs in Wyoming. The responsibilities of the Contractor Manager/Project Executive (Director) role are to oversee contractors and key resources to design, develop, test, and implement system releases through hybrid agile methods.				
Skills Utilized and Experience Attained	The skills utilized in this role include contract management and execution, communication of risks and issues, executive level reporting and presentation, communications, and strategic planning. Experience attained includes serving as primary interface for Department leadership, governance bodies, State Executive sponsors, and other stakeholders for activities related to contract administration, overall engagement management and scheduling, correspondence, dispute resolution, and status reporting.				
Project Title	Nevada Division of Welfare and Supportive Services (DWSS) – Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP & TANF)				
Position Title	Project Account/Executive (Director)				
Begin Date	07/09/2012	End Date	Present	# of Months	125
Scope and Description of Responsibility	The scope of the Health Care Reform Eligibility Engine (HCR-EE) project was to design, develop, implement, and maintain the Health Care Reform solution for the citizens of Nevada. The Access Nevada enhancement project was initiated to design, develop, and implement enhancements to the customer-facing, web-based self-service application. Responsibilities include managing day-to-day operations while fostering open communication channels across all stakeholders; overseeing client communications and project activities involving interactions between the Deloitte team and DWSS; and working with the Division's Project Manager.				
Skills Utilized and Experience Attained	Skills utilized in this role include contract management and execution, communication of risks and issues, executive level reporting and presentation, communications, and strategic planning. Experience attained in this role includes serving as the primary interface for stakeholders, responsible for the project's overall success. In this role Rakesh's duties and responsibilities also included signature authority to commit the Contractor to Contracts, Amendments and Change Notices. He was responsible for communicating and reporting on Project progress, risks, and issues on an ongoing basis.				
Project Title	Interim State Wide Automated System (ISAWS) Project				
Position Title	Project Manager				
Begin Date	10/12/2008	End Date	08/19/2010	# of Months	22

M&E PROJECT MANAGER					
Scope and Description of Responsibility	The Scope of the ISAWS project was to provide maintenance and operation support to all 35 California ISAWS counties. As the Project Manager, Rakesh was responsible for day-to-day management of activities, including working with government stakeholders on the operations of the ISAWS system which includes application development, system support, help desk operation, implementation support, and change management.				
Skills Utilized and Experience Attained	Skills utilized in this role include executing and managing contracts and tracking, communicating, and reporting on project activities. Experience attained includes serving as the primary interface of project activities, conducting project management activities and working cooperatively with multiple stakeholders.				
Project Title	California Work Opportunity and Responsibility to Kids Information Network (CalWIN) Project				
Position Title	Conversion Manager and Production Manager				
Begin Date	09/10/2002	End Date	02/10/2007	# of Months	53
Scope and Description of Responsibility	The scope of the CalWIN project included the implementation of a client-based, on-line, real-time update system that supports the major processing functions of the Welfare Client Data System (WCDS) Consortium – an association of 18 California counties that administer services for over 40% of the state's public assistance caseload. As the Conversion and Production Manager, Rakesh was responsible for working with his functional team to identify and address data purification issues related to data handling and exceptions during the automated conversion testing, developed conversion strategy, and oversaw county implementation.				
Skills Utilized and Experience Attained	Skills attained in this role include project management, including tracking project progress, risks and issues. Experience attained includes working with multiple stakeholders to execute project requirements. Through his experience he also worked with CalWIN Counties to resolve escalated issues working across stakeholder groups to address conversion and production related incidents.				
Education (add rows as needed)					
Years	Course of Study	School			
05/2002	Master of Business Administration (MBA)	Arizona State University			
05/2000	Bachelor of Science, Computer Information Systems	Arizona State University			
Professional Certifications or Designations (add rows as needed)					
Certification or Designation	Organization	Dates			
Project Management Professional (PMP)	Project Management Institute	08/2005 – Present			

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: Wyoming Department of Health	Contact Name: [REDACTED]
Project Name: Wyoming Eligibility System (WES)	Company Name: Wyoming Department of Health
Time Period: 07/11/2016 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	[REDACTED]
Staff Role: Contractor Manager/Project Executive (Director)	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Wyoming Department of Health, Wyoming Eligibility System (WES) Project. The WES Project is a large and complex IT health and human services project that is in production with three major components – Worker Portal, Customer Portal (CWP) and the Enterprise Document Management System (EDMS). The EWS CWP application is a modernize user facing front-end platform. There are multiple COTS products including IBM ODM rules engine, Red Hat JBoss EAP, and Oracle Database. There are more than five internal and external interfaces including CMS, Non-ESI MEC, RIDP (Remote Identity Proofing), Internal Revenue Service (IRS), SSA (Social Security Administrator). The worker portal and customer portal are accessible to more than 1,000 users in multiple locations and the project value is more than \$10M. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>Rakesh serves as the primary point of contact for Department leadership, governance bodies, and other State Executive sponsors for activities related to The Wyoming Eligibility System (WES). This includes leading multiple teams (application development, functional, technical, and testing teams) to deliver high-quality system releases and address functional and technical questions/issues, and reviews system and business operational measures and recommends improvements for both business operations and system functionality. Rakesh acts as the primary interface with the Department executives and is responsible for staffing and confirming that resources on the team possess the appropriate skills and experience necessary to fulfil the responsibilities of the project. He proactively collaborates and coordinates with internal and external stakeholders, including other contractors, project leadership, department leadership, and project team members. Rakesh is also integral in all discussions related to project risk, issues, amendments, and change notices. He regularly engages with executive leadership to report on project progress, contractual requirements, escalated issues, and risk mitigation. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements.</p>	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Project #2	Contact #2
Company Name: Nevada Division of Welfare and Supportive Services (DWSS)	Contact Name: [REDACTED]
Project Name: Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP & TANF)	Company Name: Nevada Division of Welfare and Supportive Services (DWSS)
Time Period: 07/09/2012 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	Email: [REDACTED]
Staff Role: Contractor Manager/Project Executive	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Health Care Reform Eligibility Engine (HCR-EE) project, which was initiated to design, develop, implement, and maintain the Health Care Reform solution for the citizens of Nevada. The Access Nevada enhancement project was initiated to design, develop, and implement enhancements to the customer facing, web-based self-service application (Access NV). This application is a modernize user facing front-end platform and integrates with multiple COTS products and integrates with at least two applications, at least one of which is a COTS. Examples of internal interfaces include Access Nevada (Self Service Citizens Portal), person identification resolution application (Master Client Index), OASIS (SNAP and TANF Employment and Training Application, and IBM Rules Engine COTS product. The solution also interfaces with at least five external systems, at least one (1) of which is real-time. Examples of external systems include the Federal Facilitated Marketplace (FFM), the Federal Data Services Hub (FDSH) in real-time, Medicaid Management Information System (MMIS), and the Nevada Division of Child & Family Services (DCFS), and Division of Public and Behavioral Health, WIC Program. The worker portal and customer portal are accessible to more than 1,500 users at multiple locations and the project value is more than \$10M. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>Rakesh is the lead director and single point of contact responsible for the project's overall success of the contract and team. In this role he manages all day-to-day operations of the project while fostering open communication channels across all stakeholders. He currently oversees client communications and project activities involving interactions between the Deloitte team and DWSS. During project initiations, Rakesh conducted all resource planning activities and the allocation of staff throughout the System Development Life Cycle (SDLC). Rakesh has managed and tracked progress throughout all phases of the project, maintaining data confidentiality per HIPAA requirements while supporting Production system operations. He has a deep understanding of eligibility policies and procedures, ACA guidelines, technology standards for SOA and security as established by protocols such as MITA, CMS 7 Standards & Conditions, and NIST. Rakesh leads Steering Team meetings involving DWSS senior leadership, including meetings with the HHS Director, Federal agencies including CMS, and the Governor's office. Rakesh acts as the primary interface with the Department executives and is responsible for staffing and confirming that resources on the team possess the appropriate skills and experience necessary to fulfil the responsibilities of the project. He proactively collaborates and coordinates with internal and external stakeholders, including other contractors, project leadership, department leadership, and project team members. Rakesh is also integral in all discussions related to project risk, issues,</p>	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
<p>amendments, and change notices. He regularly engages with executive leadership to report on project progress, contractual requirements, escalated issues, and risk mitigation. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements.</p>	
<p>Total Duration of all Projects cited to meet the MQ: 202 months</p>	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: Wyoming Department of Health	Contact Name: [REDACTED]
Project Name: Wyoming Department of Health – Wyoming Eligibility System (WES)	Company Name: Wyoming Department of Health
Time Period: 07/11/2016 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	[REDACTED]
Staff Role: Contractor Manager/Project Executive (Director)	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Wyoming Department of Health, Wyoming Eligibility System (WES) Project. The WES Project is a large and complex IT health and human services project that is in production with three major components – Worker Portal, Customer Portal (CWP) and the Enterprise Document Management System (EDMS). The EWS CWP application is a modernize user facing front-end platform. This is device portable multi-threaded application build using Angular and Spring framework. There are multiple COTS products including IBM ODM rules engine, Red Hat JBoss EAP, and Oracle Database. There are more than five internal and external interfaces including CMS, Non-ESI MEC, RIDP (Remote Identity Proofing), Internal Revenue Service (IRS), SSA (Social Security Administrator). The worker portal and customer portal are accessible to more than 1,000 users and the project value is more than \$10M. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>Rakesh is a Project Management Professional (PMP) Certified Project Manager since 2005, and he applies his Project Management knowledge areas across scope, time, cost, human resource, risk, quality, integration, and communication as the Project Director for the WES Project. For the WES Project, Rakesh manages all phases of the Software Development Lifecycle (SDLC) from initial requirements, where he managed the scope, time, cost, and human resource by leading the project management office through the requirements validation and work breakdown phase, and by interfacing with Department Executives to confirm business objectives, policy, and compliance objectives were met. Rakesh also leads the implementation phase of the project, where his focus was on risk, quality,</p>	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

Integration, and communication, facilitating the project with transparency through the project management and reporting procedures Rakesh put in place, as well as the ongoing **Project Steering Committee governance** and joint application design structure and escalation and Executive reporting processes and procedures. Finally, in the maintenance and operations phase of the project, Rakesh manages **key performance indicators**, as well as **established processes** across multiple teams (application development, functional, technical, and testing teams) to deliver high-quality system releases and address functional and technical questions/issues. He also regularly reviews system and business operational measures and **recommends improvements for both business operations and system functionality**. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements.

Project #2	Contact #2
Company Name: Nevada Division of Welfare and Supportive Services (DWSS)	Contact Name: [REDACTED]
Project Name: Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP & TANF)	Company Name: Nevada Division of Welfare and Supportive Services (DWSS)
Time Period: 07/09/2012 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	Email: [REDACTED]
Staff Role: Contractor Manager/Project Executive	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Health Care Reform Eligibility Engine (HCR-EE) project, which was initiated to design, develop, implement, and maintain the Health Care Reform solution for the citizens of Nevada. During this project, Nevada Medicaid and CHIP policies were revised to align with the Affordable Care Act (ACA) and introduce new Service-Oriented Architecture (SOA) components, specifically a business rules engine, integrated with existing eligibility and case management solutions. The Access Nevada enhancement project was initiated to design, develop, and implement enhancements to the customer facing, web-based self-service application (Access NV). This application is a modernize user facing front-end platform and integrates with multiple COTS products and integrates with at least two applications, at least one of which is a COTS. Examples of internal interfaces include Access Nevada (Self Service Citizens Portal), person identification resolution application (Master Client Index), OASIS (SNAP and TANF Employment and Training Application, and IBM Rules Engine COTS product. The solution also interfaces with at least five external systems, at least one (1) of which is real-time. Examples of external systems include the Federal Facilitated Marketplace (FFM), the Federal Data Services Hub (FDSH) in real-time, Medicaid Management Information System (MMIS), and the Nevada Division of Child & Family Services (DCFS), and Division of Public and Behavioral Health, WIC Program. The worker portal and customer portal are accessible to more than 1,500 users and the project value is more than \$10M. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p>	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

Rakesh is a Project Management Professional (PMP) Certified Project Manager since 2005, and he applies his Project Management knowledge areas across scope, time, cost, human resource, risk, quality, integration, and communication on the Health Care Reform Eligibility Engine (HCR-EE) project. Rakesh conducts all **human resource planning** activities and staff allocation throughout the SDLC. He manages **scope, time, and cost** during project initiation and on an ongoing basis for the Access Nevada enhancement project, designed to implement enhancements to the customer-facing, web-based self-service application, Access NV. Rakesh manages and tracks progress throughout all phases of the project, focused on **risk, quality, and integration** for this complex project which requires maintaining data confidentiality per HIPAA requirements while supporting Production system operations. He understands eligibility policies and procedures, ACA guidelines, technology standards for SOA, and security established by protocols such as MITA, CMS 7 Standards & Conditions, and NIST. From a **communications** standpoint, Rakesh works with Executive leadership across multiple cross-agency stakeholders, a wide variety of public assistance and health coverage programs, and complex data sharing and trading partner agreements. Through this project, Rakesh effectively manages through the use of industry best practices and quality assurance techniques to align project activities to the business challenges faced by the client and mitigate risks associated with large technology engagements. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements. He is effective in partnering with clients to navigate complex stakeholder environments.

Total Duration of all Projects cited to meet the MQ:

202 months

Minimum Qualification 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.
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Project #1

Contact #1

Company Name: State of Wyoming

Contact Name: [REDACTED]

Project Name: Wyoming Department of Health – Wyoming Eligibility System (WES)

Company Name: Wyoming Department of Health

Time Period: 07/11/2016 – Present

Phone Number: [REDACTED]

Percentage of Time: 30

Staff Role: Contractor Manager/Project Executive (Director)

Description of relevant experience:

Rakesh serves as the Project Executive (Director) for the Wyoming Department of Health, Wyoming Eligibility System (WES) Project. The WES Project is a **large and complex IT health and human services project** that is in production with three major components – Worker Portal, Customer Portal (CWP) and the Enterprise Document Management System (EDMS). The EWS CWP application is a modernize user **facing front-end platform**. This is device portable multi-threaded application build using Angular and Spring framework. There are **multiple COTS products** including IBM ODM rules engine, Red Hat JBoss EAP, and Oracle Database. There are **more than five internal and external interfaces** including CMS, Non-ESI MEC, RIDP (Remote Identity Proofing), Internal Revenue Service (IRS), SSA (Social Security Administrator). The worker portal and customer portal are accessible to **more than 1,000 users and the project value is more than \$10M**.

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.

Rakesh supervises teams of **more than 50 resources including project management, development, design, implementation, and operations teams** on this large and complex IT system project. Rakesh acts as the primary interface with the Department executives and is responsible for staffing and confirming that resources on the team possess the appropriate skills and experience necessary to fulfil the responsibilities of the project. He proactively collaborates and coordinates with internal and external stakeholders, including other contractors, project leadership, department leadership, and project team members. Rakesh is also integral in all discussions related to project risk, issues, amendments, and change notices. He regularly engages with executive leadership to report on project progress, contractual requirements, escalated issues, and risk mitigation. Rakesh has handled staffing the right skills at the right time based on the needs of the project. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements. Rakesh also has experience leading remote teams, having successfully navigated the management of the team through development, design, implementation, and operations phases of projects through a culture of collaboration and partnership.

Project #2	Contact #2
Company Name: Nevada Division of Welfare and Supportive Services (DWSS)	Contact Name: [REDACTED]
Project Name: Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP & TANF)	Company Name: Nevada Division of Welfare and Supportive Services (DWSS)
Time Period: 07/09/2012 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	[REDACTED]
Staff Role: Contractor Manager/Project Executive	
Description of relevant experience:	
<p>Rakesh serves as the Project Executive (Director) for the Health Care Reform Eligibility Engine (HCR-EE) project, which was initiated to design, develop, implement, and maintain the Health Care Reform solution for the citizens of Nevada. During this project, Nevada Medicaid and CHIP policies were revised to align with the Affordable Care Act (ACA) and introduce new Service-Oriented Architecture (SOA) components, specifically a business rules engine, integrated with existing eligibility and case management solutions. The Access Nevada enhancement project was initiated to design, develop, and implement enhancements to the customer facing, web-based self-service application (Access NV). This application is a modernize user facing front-end platform and integrates with multiple COTS products and integrates with at least two applications, at least one of which is a COTS. Examples of internal interfaces include Access Nevada (Self Service Citizens Portal), person identification resolution application (Master Client Index), OASIS (SNAP and TANF</p>	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

Employment and Training Application, and IBM Rules Engine COTS product. The solution also **interfaces with at least five external systems, at least one (1) of which is real-time.** Examples of external systems include the Federal Facilitated Marketplace (FFM), the Federal Data Services Hub (FDSH) in real-time, Medicaid Management Information System (MMIS), and the Nevada Division of Child & Family Services (DCFS), and Division of Public and Behavioral Health, WIC Program. The worker portal and customer portal are accessible to **more than 1,500 users and the project value is more than \$10M.** The solution includes multi-tiered processing, including a customer facing front-end optimized in the Nevada Worker Portal, AMPS (Application Modernization and Productivity Services) and the Nevada Self Service Citizens Portal, Access Nevada. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.

Rakesh supervises teams of **more than 50 resources including project management, development, design, implementation, and operations teams** on this large and complex IT system project. Rakesh acts as the primary interface with the Department executives and is responsible for staffing and confirming that resources on the team possess the appropriate skills and experience necessary to fulfil the responsibilities of the project. He proactively collaborates and coordinates with internal and external stakeholders, including other contractors, project leadership, department leadership, and project team members. Rakesh is also integral in all discussions related to project risk, issues, amendments, and change notices. He regularly engages with executive leadership to report on project progress, contractual requirements, escalated issues, and risk mitigation. Rakesh has handled staffing the right skills at the right time based on the needs of the project. Rakesh possesses years of experience as an IT executive having worked in California with Counties, and in Human Services. He leverages his extensive background in technology to partners with clients to identify and bring forward technology options and innovative recommendations that yield the highest value. He also engages with clients to lead on annual strategic planning focused on technology improvements. Rakesh also has experience leading remote teams, having successfully navigated the management of the team through development, design, implementation, and operations phases of projects through a culture of collaboration and partnership.

Total Duration of all Projects cited to meet the MQ:		202 months
Minimum Qualification 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.	
Project #1		Contact #1
Company Name: State of Wyoming		Contact Name: [REDACTED]

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Project Name: Wyoming Department of Health – Wyoming Eligibility System (WES)	Company Name: Wyoming Department of Health
Time Period: 07/11/2016 – Present	Phone Number: [REDACTED]
Percentage of Time: 30	[REDACTED]
Staff Role: Contractor Manager/Project Executive (Director)	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Wyoming Department of Health, Wyoming Eligibility System (WES) Project. The WES Project is a large and complex IT health and human services project that is in production with three major components – Worker Portal, Customer Portal (CWP) and the Enterprise Document Management System (EDMS). The EWS CWP application is a modernize user facing front-end platform. This is device portable multi-threaded application build using Angular and Spring framework. There are multiple COTS products including IBM ODM rules engine, Red Hat JBoss EAP, and Oracle Database. There are more than five internal and external interfaces including CMS, Non-ESI MEC, RIDP (Remote Identity Proofing), Internal Revenue Service (IRS), SSA (Social Security Administrator). The worker portal and customer portal are accessible to more than 1,000 users and the project value is more than \$10M. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>Rakesh is the Project Director responsible for working relationships with key internal and external stakeholders, project and agency executives, executive communications and status reporting, and business-partnering relationships. Rakesh manages internal stakeholders for day-to-day operations by fostering open communication channels across all stakeholders. These internal stakeholders include project Steering Teams, involving senior leadership, including meetings with the HHS Director. Rakesh also manages external stakeholders which involve meetings with Federal agencies, CMS, and other exchange partners. As the primary point of contact for Department leadership, governance bodies, and other State Executive sponsors for activities for the WES project. He also facilitates ongoing executive discussions and risk reviews with the Project Manager of the project through executive communications and status reporting. Rakesh also leads with more than a decade of knowledge in health and human services to foster business partnering relationships. His combined knowledge and strong stakeholder management has led to creative problem solving and innovative solutions to implement functionality required to meet base business and system requirements, reduce reliance on monthly batch processes for continued issuance of coverage, improve performance, simplify reporting, and support scalability for additional programs integrated with Medicaid and CHIP in the WES.</p>	
Project #2	Contact #2
Company Name: Nevada Division of Welfare and Supportive Services (DWSS)	Contact Name: [REDACTED]
Project Name: Worker Portal, Health Care Reform, State Supported Based Marketplace Integration, and IE Modernization (SNAP & TANF)	Company Name: Nevada Division of Welfare and Supportive Services (DWSS)
Time Period: 07/09/2012 – Present	Phone Number: [REDACTED]

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Percentage of Time: 30	
Staff Role: Contractor Manager/Project Executive	
<p><i>Description of relevant experience:</i></p> <p>Rakesh serves as the Project Executive (Director) for the Health Care Reform Eligibility Engine (HCR-EE) project, which was initiated to design, develop, implement, and maintain the Health Care Reform solution for the citizens of Nevada. During this project, Nevada Medicaid and CHIP policies were revised to align with the Affordable Care Act (ACA) and introduce new Service-Oriented Architecture (SOA) components, specifically a business rules engine, integrated with existing eligibility and case management solutions. The Access Nevada enhancement project was initiated to design, develop, and implement enhancements to the customer facing, web-based self-service application (Access NV). This application is a modernize user facing front-end platform and integrates with multiple COTS products and integrates with at least two applications, at least one of which is a COTS. Examples of internal interfaces include Access Nevada (Self Service Citizens Portal), person identification resolution application (Master Client Index), OASIS (SNAP and TANF Employment and Training Application, and IBM Rules Engine COTS product. The solution also interfaces with at least five external systems, at least one (1) of which is real-time. Examples of external systems include the Federal Facilitated Marketplace (FFM), the Federal Data Services Hub (FDSH) in real-time, Medicaid Management Information System (MMIS), and the Nevada Division of Child & Family Services (DCFS), and Division of Public and Behavioral Health, WIC Program. The worker portal and customer portal are accessible to more than 1,500 users and the project value is more than \$10M. The solution includes multi-tiered processing, including a customer facing front-end optimized in the Nevada Worker Portal, AMPS (Application Modernization and Productivity Services) and the Nevada Self Service Citizens Portal, Access Nevada. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>Rakesh is the Project Director responsible for working relationships with key internal and external stakeholders, project and agency executives, executive communications and status reporting, and business-partnering relationships. Rakesh manages internal stakeholders throughout all phases of the project by leveraging his years of experience and knowledge of eligibility policies and procedures. Rakesh leads Steering Team meetings involving DWSS senior leadership, including meetings with the HHS Director, Federal agencies, CMS, and the Governor's office, to manage project risk, reporting, as well as external stakeholder management. Rakesh also leads the project with transparency across project and agency executives, executive communications, and status reporting, leveraging his knowledge of ACA guidelines. Finally, with trading partners as well as external agency relationships, he's led discussions and business-partnering relationships exceptionally by leveraging knowledge of technology standards for SOA, and security established by protocols such as MITA, CMS 7 Standards & Conditions, and NIST.</p>	
Total Duration of all Projects cited to meet the MQ:	202 months
Minimum Qualification ME-S7	Possess and maintain a valid Project Management Institute (PMI) Project Management Professional (PMP) certification throughout the term of this Agreement.

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE				
Certification / Degree Title	Certification Number	Original Grant Date	Expiration Date	Online Validation Link; if not available, attach a copy to the offer
Project Management Professional (PMP)	273406	09/07/2005	09/07/2024	Copy attached

Attached Certification:



1.2 M&E Project Management Office Lead, Donna Cain

M&E PROJECT MANAGEMENT OFFICE LEAD					
PART 1 – RÉSUMÉ					
Contractor	Deloitte Consulting LLP				
Candidate Name	Donna Cain				
Position in the Company	Manager	Length of Time in Position	13 years, 7 months Overall time at company (13 years, 7 months)		
Project Position & Responsibilities	As the M&E Project Management Office (PMO) Lead, Donna works closely with the M&E Project Manager and provides PMO support in execution of the M&E Contractor's Agreement responsibilities. She adheres to the Consortium's PCD and other Consortium required processes and procedures. Responsibilities include: Managing and monitoring the M&E work plan; Confirming the M&E Contractor's Team understands and adheres to work plan activities, deliverable responsibilities, and project processes and procedures; Leading and supporting the development and delivery of all M&E deliverables and work products.; Providing financial reporting regarding planned and actual expenditures on a monthly basis; Establishing and managing M&E related issue resolution and risk mitigation strategies.				
Skills & Qualifications for Project Position	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.				
Relevant Experience (Add additional tables as needed)					
Project Title	[REDACTED]				
Position Title	Project Management Office (PMO) and Quality Assurance (QA) Lead				
Begin Date	11/11/2021	End Date	Present	# of Months	13
Begin Date	05/01/2019	End Date	11/10/2021	# of Months	30
Begin Date	01/04/2019	End Date	04/30/2019	# of Months	3

M&E PROJECT MANAGEMENT OFFICE LEAD					
Scope and Description of Responsibility	The scope of the [REDACTED] project includes providing services to the [REDACTED] Information Technology (IT) infrastructure. As the PMO/QA Lead, Donna manages several processes, including project Scope of Work to track requirements and risk, full account human resources, quality management and deliverables, work products, and communication. The responsibilities of the PMO and QA Lead include overseeing PM activities for human resources, communication, compliance, scope, risk, and integration. She manages account and financial management for time and cost, knowledge, and deliverable quality management. Donna also led the design, development, testing, and implementation of three Project Management (PM) tools and facilitates the quarterly Leadership Engagement Reviews (LERs).				
Skills Utilized and Experience Attained	The skills utilized are in managing functional and technical teams in the software development lifecycle to support IT services for the project. The experience attained are in providing PM services in support of a large, complex IT project. Donna gained extensive experience performing risk, action, issue, decision (RAID) management for a 250-member team.				
Project Title	California Department of Public Health – Screening Information System (SIS) M&O				
Position Title	Results Management Office (RMO) Lead				
Begin Date	05/01/2019	End Date	11/10/2021	# of Months	30
Scope and Description of Responsibility	The scope of the SIS M&O project included enhancing the Online Web Application for California's SIS through the addition of new technical features. The responsibilities of the RMO Lead included confirming the PM activities were met according to schedule. Donna's responsibilities included managing on/offboarding, deliverables and Confidential Information management, SharePoint data collection sites for project centralized repository, and preparing delivery and presentation of the Monthly Status Report. Donna also designed, developed, and deployed a new COVID-19 Response, SharePoint document management system.				
Skills Utilized and Experience Attained	The skills utilized are managing the quality of deliverables and program risks. She leveraged her expertise to continually provide new tools, or enhancements to existing tools, for various Project Management activities, very similar to CalSAWS requirements. The experience attained are through leading the design, development, testing and training for the COVID-19 Response, SharePoint document management system.				
Project Title	Oregon Department of Human Services – OregONE Eligibility System for MAGI Eligibility and Enrollment				
Position Title	Project Management Office (PMO) Lead				
Begin Date	07/15/2014	End Date	01/01/2019	# of Months	53
Scope and Description of Responsibility	The scope of the project included providing maintenance and operations for the Modified Adjusted Gross Income (MAGI) Medicaid worker eligibility portal and develop an integrated eligibility system for the State's non-MAGI Medicaid, Supplemental Nutrition Assistance (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC) programs. The responsibilities of the PMO Lead included managing the planning and provided PM services. Responsibilities included: Defining and executing the methods for PMO and human resource processes; Developing, executing, and maintaining the Project Management Plan deliverables and methodology; Developing and managing project schedule, and delivering weekly and monthly status reports;				

M&E PROJECT MANAGEMENT OFFICE LEAD					
	Implementing, administering, and managing a project control repository; Managing Statements of Work (SoW), and project cost.				
Skills Utilized and Experience Attained	The skills utilized are providing comprehensive PM services in support of a large, complex IT system. She leveraged years of PM expertise to provide services in a variety of management areas, very similar to CalSAWS requirements. The experience attained are utilizing her skills in PM services including, financial reporting and confirming team adhered to deliverable schedule.				
Project Title	Montana Department of Public Health and Human Services – Combined Health Information Management System – Enterprise Architecture				
Position Title	Project Management Office (PMO) Manager				
Begin Date	01/04/2013	End Date	07/14/2014	# of Months	18
Scope and Description of Responsibility	As the PMO Manager for the Montana department of Public Health and Human Services, Donna directly supervised all critical PM functions necessary for the engagement's completion. Donna was responsible for the project's scope and associated costs, the risks to the project's completion, and the quality of the deliverables developed for the client through her supervision of all PM activities and deliverables.				
Skills Utilized and Experience Attained	The skills utilized include directing the project's schedule and integrated project responsibilities through the implementation of a project tracking tool to manage action items, issues, risks, change requests, and other important project operations. The experienced attained include overseeing the project's human resources activities (including on/off-boarding processes for all team members) and confirming effective communication with client staff by updating project agreements monthly and delivering timely and accurate invoices to clients.				
Education (add rows as needed)					
Years	Course of Study		School		
06/1987	Associate in Arts – Business		Bellevue Community College		
08/2010	Bachelor of Arts – Business and Management		University of Montana, Montana Technology		
Professional Certifications or Designations (add rows as needed)					
Certification or Designation	Organization		Dates		
Project Management Professional	Project Management Institute		04/2004 – 04/2006		
Authorized Training Partner (ATP/PMP)	Project Management Institute		2022 – Present (no expiration date)		
ITIL 4 Foundations	Axelos		2019 – Present (no expiration date)		
SAFe 4 Agilist	Scaled Agile, Inc.		01/2020 – 01/2024		

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification ME-S8	A minimum of three (3) years of experience within the past five (5) year leading a PMO in a systems integrator organization, Federal, State, County, or Consortium organization.
Project #1	Contact #1
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Time Period: 01/04/2019 – Present	Phone Number: [REDACTED]
Percentage of Time: 11/11/2021– Present at 100%; 05/01/2019 – 11/10/2021 at 80%; 01/04/2019 – 04/30/2019 at 100%	Email: [REDACTED]
Staff Role: Project Management Office (PMO)	
Description of relevant experience:	
<p>Donna served as the Project Management Office (PMO) Lead for the [REDACTED] project which provides services to the [REDACTED] Information Technology (IT) infrastructure. Donna operates within the [REDACTED] environment, which includes a large and complex IT system comprised of 500 applications, 23 of which are COTS, and interfaces with greater than 400 external systems with connections in real time. The critical IT system is accessed by over 3,500 users across 10 locations. The [REDACTED] solution includes multi-tiered processing, including a customer facing front-end. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>As the PMO Lead for the [REDACTED], Donna manages the PM processes integrating within the department and teammates. She leads the design, development, testing, and implementation of tools to standardize, collect, and report program/project information across the Deloitte and client teams. Additionally, she oversees the management activities for the project which has contract value of over ten million (\$10,000,000) dollars. Activities she oversees include managing and monitoring the workplan, project deliverables, quality, Confidential Information (CI) management, account access, risk/issue/decision management, Service Level Agreements (SLAs), recruitment tracking, security clearances, on/off-boarding, coach/coachee assignments, performance management, Government Furnished Equipment (GFE) management and reporting, travel, budget/finance, compliance, team member performance and status reporting. She coordinates and facilitates the quarterly LERs. She utilizes of SharePoint and Microsoft Project to confirm the timely delivery and retention of high-quality products that fulfill the client's needs while remaining within the standards, budget, and schedule established by the statement of work.</p>	

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
Project #2	Contact #2
Company Name: California Department of Public Health	Contact Name: [REDACTED]
Project Name: Screening Information System (SIS) M&O; COVID-19 Response System	Company Name: California Department of Public Health
Time Period: 05/01/2019 – 11/10/2021	Phone Number: [REDACTED]
Percentage of Time: 20	Email: [REDACTED]
Staff Role: Results Management Office (RMO) Lead	
<p>Description of relevant experience:</p> <p>The scope of the SIS M&O project included enhancing the Online Web Application for California's SIS through the addition of new technical features. As the Results Management Office (RMO) Lead (Project Management Office Lead) for the California Department of Public Health, a system integrator project, Donna confirmed the on/offboarding, deliverable management, and confidential information management processes were efficient and effective to meet project requirements within deadlines. She managed team access to the content needed to perform day-to-day activities. The RMO team serves in all the same capacities as the Project Management Office used an Agile Kanban method to manage recurring activities, and they used an Agile scrum method for RMO process improvements and enhancements. She created and managed SharePoint data collection sites for team member data, which included roster, network access, training records, working documents, deliverables, contracts, pursuits, and training materials. She assisted with DevOps dashboard design to accurately track key areas of improvement.</p>	
Project #3	Contact #3
Company Name: Oregon Department of Human Services, Oregon Health Authority	Contact Name: [REDACTED]
Project Name: OregONE Eligibility System for MAGI Eligibility and Enrollment; Integrated ONE System	Company Name: Oregon Department of Human Services, Oregon Health Authority
Time Period: 07/14/2014 – 01/01/2019 (Past 5 years 01/04/2018 – 01/01/2019)	Phone Number: [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: Project Management Office (PMO) Lead	
<p>Description of relevant experience:</p> <p>The scope of the project included providing maintenance and operations for the <i>Modified Adjusted Gross Income (MAGI) Medicaid worker eligibility portal</i> and develop an integrated eligibility system for the State's non-MAGI Medicaid, Supplemental Nutrition Assistance (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC) programs. The ONE system is a fully functional MAGI Medicaid Eligibility Determination application and is integrated with MMIS for real-time transfer of eligibility information. The solution includes an integration with more than two applications, COTS applications, more than five external systems, including bidirectional interface with the Federal Facilitated Marketplace (FFM) to transfer applications and eligibility results. ONE includes a 24x7</p>	

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE

accessible single, integrated online application (Self-Service portal) **serving more than 1,000 workers at multiple locations through a customer user facing front end** with a smooth user experience along with a Worker Portal that provides workers with eligibility and case management features for application intake and processing, workflow, case maintenance, renewals, and interfaces. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.

As the **PMO Lead** for the Oregon Department of Human Services, a systems integrator project, Donna managed all PM services required to define and execute project processes under the statement of work. Donna managed the planning and project management services to define and execute the methods and processes to support the work as planned, executed, and monitored (controlled). She used Project Management Center, Microsoft Project, Microsoft Team Foundation Server, and SharePoint to develop and execute the project management plan's deliverables and methodology within deadlines while remaining within budget and adhering to the standards established by the statement of work.

Total Duration of all Projects cited to meet the MQ:

88 months

Minimum
Qualification 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.

Project #1

Contact #1

Time Period: 01/04/2019 – Present

Percentage of Time:

11/11/2021 – Present at 100%;

05/01/2019 – 11/11/2021 at 80%;

01/04/2019 – 05/01/2019 at 100%

Staff Role: Project Management Office (PMO) Lead

Description of relevant experience:

The scope of the [REDACTED] project includes providing services to the [REDACTED] Information Technology (IT) infrastructure. Donna operates within the [REDACTED] environment, which includes a **large and complex IT system comprised of 500 applications, 23 of which are COTS, and interfaces with greater than 400 external systems with connections in real time.** The critical IT system is accessed by over **3,500 users across 10 locations.** The [REDACTED] solution includes **multi-tiered processing**, including a **customer** or user facing front-end. The contract value exceeds \$10M.

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE

Donna manages several processes as the **PMO Lead** for the [REDACTED] project. Processes include **human resource** activities like on/offboarding and training/compliance management, project communication, account management, travel management, financial management, knowledge management, deliverable management, quality management, **risk management**, and Confidential Information (CI) management. She directly oversees critical components of successful project delivery through her management of these processes, including accurately assessing the costs burdens and schedule of the work based on its scope. She analyzes the risks that threaten completion of the project and uses this knowledge to influence the project's **time and financial processes**, adapting the project's budget and schedule to mitigate said risks when necessary. She supports project **integration** by coordinating and facilitating quarterly LERs, and she manages project costs by initiating purchase orders/adjustments and reviewing/approving invoices for payment. She supervises the hiring and training of new team members, the quality of products produced by the team, the retention of relevant information, and the safeguarding of confidential information throughout the life of the project. In addition, Donna also monitors scope, quality, and communications throughout the project, working closely with the client PMO Lead as well as project leadership.

Project #2

Contact #2

Company Name: California Department of Public Health

Contact Name: [REDACTED]

*Project Name: Screening Information System (SIS) M&O;
COVID-19 Response System*

Company Name: California Department of Public Health

Time Period: 05/01/2019 – 11/10/2021

Phone Number: [REDACTED]

Percentage of Time: 20

Email: [REDACTED]

Staff Role: Results Management Office (RMO)Lead

Description of relevant experience:

The scope of the SIS M&O project included enhancing the Online Web Application for California's SIS through the addition of new technical features. As the **RMO Lead for the California Department of Public Health**, Donna confirmed PM processes were **time-efficient** and effective to meet project requirements within deadlines and maintained the project schedule. She was directly responsible for managing critical aspects of project delivery, including **human resource activities** such as on/offboarding and training of new team members and providing them access to working documents and training materials, using Agile Kanban methods to streamline project delivery, and safeguarding the protection of CI throughout the life of the project. She developed, executed, and maintained the project management plan deliverables for the fit-gap, design, development and implementation, maintenance and operations, and enhancement and support services phases of the project. Donna played a key role in monitoring the cost and scope of the project through her management of contracts and pursuits. She confirmed quality project delivery in a timely manner while **mitigating risks** where necessary and adhering to the standards of the contract agreement. She managed **communication** across project teams and facilitated integration between teams by providing status and metrics to project leaders and workstream leads for weekly and monthly status reports or leadership meetings. In addition, Donna also monitors scope, quality, and communications throughout the project, working closely with the client PMO Lead as well as project leadership.

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
Project #3	Contact #3
Company Name: Oregon Department of Human Services, Oregon Health Authority	Contact Name: [REDACTED]
Project Name: OregONE Eligibility System for MAGI Eligibility and Enrollment; Integrated ONE System	Company Name: Oregon Department of Human Services, Oregon Health Authority
Time Period: 07/14/2014 – 01/01/2019	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Project Management Office (PMO) Lead	
<p>Description of relevant experience:</p> <p>The scope of the project included providing maintenance and operations for the Modified Adjusted Gross Income (MAGI) Medicaid worker eligibility portal and develop an integrated eligibility system for the State's non-MAGI Medicaid, Supplemental Nutrition Assistance (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC) programs. The ONE system is a fully functional MAGI Medicaid Eligibility Determination application and is integrated with MMIS for real-time transfer of eligibility information. The solution includes an integration with more than two applications, COTS applications, more than five external systems, including bidirectional interface with the Federal Facilitated Marketplace (FFM) to transfer applications and eligibility results. ONE includes a 24x7 accessible single, integrated online application (Self-Service portal) serving more than 1,000 workers at multiple locations through a customer user facing front end with a smooth user experience along with a Worker Portal that provides workers with eligibility and case management features for application intake and processing, workflow, case maintenance, renewals, and interfaces. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>As the PMO Lead for the Oregon Department of Human Services, Donna was responsible for all PM services required to define and execute project processes under the statement of work. She directly supervised the management of the project's scope, risk, and quality through her development of the Project Management Plan, along with her management of the project's statements of work. She directly oversaw the financial cost of the project. Donna confirmed the timely completion of deliverables and effective communication and integration between Deloitte and client staff through her development of a project schedule and the delivery of weekly and monthly project status reports. She spearheaded the project's human resources processes by defining and executing the project's PMO and human resource methodology, including managing time, integration, and project management.</p>	

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE				
Project #4		Contact #4		
Company Name: Montana Department of Public Health and Human Services		Contact Name: [REDACTED]		
Project Name: Combined Health Information Management System – Enterprise Architecture		Company Name: Montana Department of Public Health and Human Services		
Time Period: 11/01/2010 – 07/14/2014 (18 months for 01/04/2013 – 07/04/2014)		Phone [REDACTED]		
Percentage of Time: 100		[REDACTED]		
Staff Role: Project Management Office (PMO) Manager				
<p>Description of relevant experience:</p> <p>As the PMO Manager for the Montana department of Public Health and Human Services, Donna directly supervised all critical PM functions necessary for the engagement's completion. Donna was directly involved with the project's scope and associated costs, the risks to the project's completion, and the quality of the deliverables developed for the client through her supervision of all PM activities and deliverables. She directed the project's schedule and integrated project responsibilities through the implementation of a project tracking tool to manage action items, issues, risks, change requests, and other important project operations. Donna oversaw the project's human resources activities (including on/off-boarding processes for all team members) and confirmed effective communication with client staff by updating project agreements monthly and delivering timely and accurate invoices to clients. The Montana Department of Public Health and Human Services' IT system is a large and complex IT system integrates more than five applications, at least one of which is a COTS. The solution interfaces with more than 5 external systems and 3 real-time systems and is accessed by more than 1,000 users. The solution includes multi-tiered processing which includes a customer/user facing front end.</p>				
Total Duration of all Projects cited to meet the MQ:		147 months		
Minimum Qualification ME-S10	Possess and maintain a valid Project Management Institute (PMI) Project Management Professional (PMP) certification throughout the term of this Agreement.			
Certification / Degree Title	Certification Number	Original Grant Date	Expiration Date	Online Validation Link; if not available, attach a copy to the offer
Project Management Professional	187157	04/23/2004	04/23/2026	Copy attached

Attached Certification:



1.3 M&E Delivery Integration Manager, Kishan Mallur

M&E DELIVERY INTEGRATION MANAGER					
PART 1 – RÉSUMÉ					
Contractor	Deloitte Consulting LLP				
Candidate Name	Kishan Mallur				
Position in the Company	Specialist Leader	Length of Time in Position	1 month Overall time at company (1 month)		
Project Position & Responsibilities	As the M&E Delivery Integration Manager, Kishan is responsible for leading and actively engaging with the Consortium and other CalSAWS contractors to facilitate the administration of the Delivery Integration Model by managing project coordination and deliverables. He will work closely with stakeholders and contractors to oversee delivery integration processes. Responsibilities include: Creating and executing plans, processes and reporting to govern multiple contractors and monitor their effectiveness; Coordinating services across CalSAWS contractor teams to align with Project goals, schedules, and strategic outcomes; Resolving disputes with contractors, serving as a point of contact, and reporting status for on-going project progress and metrics; Coordinating the timing and working with teams to define entry/exit criteria associated with design, build, test, and delivery across contractors; Identify and resolve conflicting tasks, priorities, schedules and resource constraints in the development of the CalSAWS Master Work Plan; Provide input to determine SCR priorities with consideration of committee decisions and testing efforts.				
Skills & Qualifications for Project Position	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. 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.				
Relevant Experience (Add additional tables as needed)					
Project Title	California Statewide Automated Welfare System (CalSAWS) - CalWIN Implementation Support Services				
Position Title	Implementation Support Services Technical & Conversion Support Lead				
Begin Date	11/28/2022	End Date	Present	# of Months	1
Scope and Description of Responsibility	The State of California is working to merge three different Consortium applications into a single integrated eligibility system to determine financial eligibility for Health and Human Service programs, including Medi-Cal, CalFresh, and CalWORKs, for over 18M Californians. Kishan's responsibilities include working with the CalSAWS and CalWIN teams for conversion and implementation support.				
Skills Utilized and Experience Attained	Skills utilized includes managing and facilitating stakeholders to prepare for large-scale IE Implementation. Experience attained includes working with the Consortium, CalSAWS contractor, California Counties, and multiple internal and				

M&E DELIVERY INTEGRATION MANAGER					
	external stakeholders to recommend project priorities, monitor and manage day-to-day conversion and implementation support activities.				
Project Title	Massachusetts Department of Health and Human Services - Integrated Eligibility & Enrollment (IE&E) Project				
Position Title	Technical Director, Integrated Eligibility & Enrollment				
Begin Date	07/01/2019	End Date	10/28/2022	# of Months	39
Scope and Description of Responsibility	Kishan led and actively coordinated initiatives across five Health and Human Services agencies to integrate Eligibility and Enrollment processes to improve the constituent experience by developing efficient and collaborative processes and practices. His responsibilities include working with infrastructure and application teams to prioritize and manage system changes.				
Skills Utilized and Experience Attained	Kishan utilized skills to comprehensive project management leadership across multidisciplinary teams and with external constituents. Kishan led efforts and gained experience such as defining project outcomes, measures, and operational Service Level Agreements (SLAs) and establishing the reporting cadence. He managed all contractors/vendors and coordinating activities with Commonwealth teams constructing the solution.				
Project Title	Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS) - Medicaid Enterprise Systems (MES) Project				
Position Title	Program Manager				
Begin Date	07/01/2017	End Date	06/30/2019	# of Months	23
Scope and Description of Responsibility	Kishan actively worked with the Associate Chief Information Officer (ACIO) for health and eligibility to document his vision for IT services for MassHealth and iteratively evolve from a collection of applications built by different vendors to a Medicaid Enterprise Solution (MES).				
Skills Utilized and Experience Attained	Kishan led an initiative to define a single strategic roadmap across teams to provide visibility, which included defining high-level milestones that helped agency leadership, contractors, and other stakeholders work under one common vision. With the ACIO, Directors, and business project/program leads for resource management, Kishan led efforts to set and monitor project goals, prioritization of resources, and governance.				
Project Title	Executive Office of Technology Services and Security - Medicaid Management Information System (MMIS) Infrastructure Upgrade Project				
Position Title	Program Manager				
Begin Date	07/01/2015	End Date	06/30/2017	# of Months	23
Scope and Description of Responsibility	Kishan led four critical initiatives across multiple teams to support functional and technical requirements for establishing and implementing priorities, allocating resources, and confirming delivery of an automated MassHealth infrastructure. He is responsible for collaborating with the Executive Office of Technology Services and Security to design and implement a private Cloud (MassCloud).				

M&E DELIVERY INTEGRATION MANAGER					
Skills Utilized and Experience Attained	Kishan utilized skills to work closely with the Assistant Secretary for Health and the Executive Committee to help prioritize activities, negotiate a brief "black-out" to cut over from the old system to the new, and engage business teams to help with change management, communication, and user-acceptance testing. Kishan gained experience leading complex project implementation to spearhead project efforts to adopt a healthy mix of solution delivery methodologies and to develop roadmaps for multidisciplinary teams and procurement strategies. Kishan worked with the Commonwealth IT and Business leads to develop a framework of practices for large IT Projects, including managing competing prioritizes and developing metrics to determine effectiveness and timeliness.				
Project Title	Massachusetts Department of Health and Human Services & Massachusetts Health Connector – Health Insurance Exchange & Integrated Eligibility System Project				
Position Title	State Program Manager				
Begin Date	11/15/2012	End Date	06/30/2015	# of Months	31
Scope and Description of Responsibility	Kishan led the implementation of an Integrated Eligibility System (IES), utilizing traditional and solution delivery methodologies to centralize access to all subsidized health coverage programs, including Medicaid and subsidized private care.				
Skills Utilized and Experience Attained	Kishan led integration efforts between the Commonwealth, federal government systems, and private care agencies. Kishan led efforts across IT leadership, program/project management, product management, procurement, contract management, and risk management. Kishan's relationship building and leadership skills were most beneficial as they were quickly recognized and served him well.				
Education (add rows as needed)					
Years	Course of Study	School			
07/1994	MS Computer Science	Eastern Washington University			
07/1990	Bachelor in Engineer Computer Science	Mysore University (SJCE)			
Professional Certifications or Designations (add rows as needed)					
Certification or Designation	Organization	Dates			
Harvard Executive Development Program for High Performing Senior Managers	Harvard University	11/2010			
Leadership Development Program	Harvard University	12/2008			

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: Massachusetts Department of Health and Human Services	Contact [REDACTED]
Project Name: Integrated Eligibility and Enrollment (IE&E) Project	Company Name: Massachusetts Department of Health and Human Services
Time Period: 07/01/2019 – 10/28/2022	Phone [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: Technical Director, Integrated Eligibility & Enrollment	
Description of relevant experience:	
<p>Kishan served as the Technical Director for the Commonwealth's Integrated Eligibility & Enrollment system, which is a system that provides customers with a single application to apply for benefits, including health (for both MAGI and non-MAGI populations, including Long Term Support Services), SNAP, TANF, housing, and early education. This IT system is a large and complex solution that runs on Amazon Web Services (AWS) Cloud, integrates with the six largest systems within the Massachusetts Executive Office of Health and Human Services (EOHHS), and also integrates with COTS solutions such as Azure AD (for IAM), OpenText ExStream, and OpenText Documentum), with several integrations in real time. The solution includes a portal and mobile application for applicants which supports 2.5 million users and generates 7 million notices a year, running multi-tiered processing in AWS including a customer and user facing front-end optimized for multiple user interface platforms. This project has a contract value of over \$10M.</p> <p>Kishan led coordination across multidisciplinary teams over various functional and technical areas to define project outcomes, measures, and operational Service Level Agreements (SLAs). Kishan managed activities of all contractors/vendors, including IV&V and QA teams, and coordinating activities with Commonwealth functional and technical teams constructing the solution to define entry/exit criteria associated with design, build, test, and delivery. He owned all technical deliverables and the overall architecture for the solution to apply for and manage benefits across agency programs in conjunction with the Chief Technology Officer (CTO) and Architecture Review Board (ARB). Kishan worked with the PMO to confirm the sequence and dependencies of each deliverable proposed aligned with the overall roadmap and project plan. He also worked across the business and technical teams to establish an SDLC model that afforded each workstream as much Agility as possible, while confirming effective oversight through a collection of gate-review milestones and checkpoints (exit/entry reviews) to keep workstreams aligned and deliverables reviewed and approved. Kishan actively identified risks and issues and worked within and across workstreams to propose mitigation strategies as the principal technical coordinator across workstreams, projects, and teams (internal and contractors). He blended technical and functional knowledge to help policy teams define requirements for users' electronic access to notices and to lead the workgroup defining the process that would support electronic noticing. He worked with EOHHS' privacy and legal teams through SSA's review of use of their data for this project and in bringing together all stakeholders (technical, business, legal, and print vendors) to expand support online and on paper notices for an additional four languages. Kishan also defined the training model and worked with vendors to fine-tune the curriculum to allow business users to view and edit Notice templates. Kishan is also a problem solver responsible for resolving disputes with contractors, serving as a point of</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
contact, and reporting status for on-going project progress and metrics. Kishan is able to resolve conflicting tasks, priorities, schedules, and resource constraints in the workplan. He has also worked across application, infrastructure, and business teams to anticipate issues and prioritize for project success.	
Project #2	Contact #2
Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)	Contact Name: [REDACTED]
Project Name: Medicaid Enterprise Systems (MES) Project	Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)
Time Period: 07/01/2017 – 06/30/2019	Phone [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: Program Manager	
<p>Description of relevant experience:</p> <p>Kishan served as the Program Manager for the Medicaid Enterprise Systems (MES) where he oversaw numerous projects and the MES strategic roadmap which blends the strategic and technical needs of the program to support programmatic goals, operational needs, and CMS mandated projects. On this project Kishan led efforts for the CMS mandate to replace the Medicare Card and the Medicare ID number. As the key identifier on all Medicare transactions, the project required 67 applications across EOHHS, including COTS applications, more than five external systems, and real-time integrations, and multi-tiered processing to be reviewed for use of this identifier. This solution impacts more than 2 million users through customer facing front-end for multiple user interface platforms at multiple locations and the project contract value was more than \$10M. The project extensively reworked and tested interfaces with CMS and many trading stakeholders. The Commonwealth was among a small number of states to successfully complete all implementation and testing on time and well below budget.</p> <p>Kishan led multidisciplinary teams across functional and technical business analysts and operations staff from nearly every agency within EOHHS in the impact analysis of this change, and then in assessing the impact of changes to each of the interfaces. The groups then drafted an RFP and selected an implementation vendor and an IV&V vendor to make the changes. Initially, there was push back from the provider community that threatened meeting the dates CMS had identified. However, serving as a point of contact and working closely with the Medicaid Director to effectively communicate CMS requirements and the benefits for them to align with Project goals, schedules, and strategic outcomes and make that change eventually helped keep the project on track. Collectively, the changes represented a project as large and complex as CalSAWS and resulted in piloting new processes and tools that have since become the standard for MES implementations. In addition, Kishan also led efforts to define an effective project operating model enforced by the governance structure in place by blending Agile and Waterfall processes to meet project needs. Kishan defining KPIs to measure and report on project progress, SLAs to track project effectiveness in meeting business needs.</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Project #3	Contact #3
Company Name: Executive Office of Technology Services and Security	Contact Name: [REDACTED]
Project Name: Medicaid Management Information System (MMIS) Infrastructure Upgrade Project	Company Name: Executive Office of Technology Services and Security
Time Period: 07/01/2015 – 06/30/2017	Phone Number: [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: Program Manager	
Description of relevant experience:	
<p>Kishan served as Program Manager working with the Executive Office of Technology Services and Security on the Medicaid Management Information System (MMIS) Infrastructure Upgrade Project. This was principally a replatforming and hardware upgrade project, which integrates more than two applications, including COTS applications, and system with interfaces with more than five external systems, including real-time systems. The project involved working with multiple MassHealth business groups and their client-facing principals to collect input on critical business dates, strategize with these groups on the sequencing and cadence for test windows that would work for trading partners, and a multi-tiered processing and testing to obtain buy-in from all stakeholders before going live which impacted more than 1,000 users at multiple locations through a user-facing front-end system, as the hub of the extended Medicaid eco-system included dozens of state-based systems, and hundreds of external trading partners. This project has a contract value of over ten million \$10M.</p> <p>Kishan managed a large swath of activities, coordinating with functional and technical stakeholders across MassHealth Medicaid and the Children's Health Insurance Program (CHIP) and Integrated Eligibility. This involved serving as a point of contact and working with providers and payers, federal systems that exchanged data with MMIS, and security teams to resolve disputes, as well as report status for on-going project progress and metrics. He also worked closely with CMS and stakeholders to define entry/exit criteria associated with the design, development, testing, delivery, and implementation of the Implementation Advance Planning Document (IAPD) for the project.</p>	
Project #4	Contact #4
Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector	Contact Name: [REDACTED]
Project Name: Health Insurance Exchange & Integrated Eligibility System Project	Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector
Time Period: 11/15/2012 – 06/30/2015 (includes 30 months for 01/04/2013 – 07/04/2014)	Phone [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: State Program Manager	
Description of relevant experience:	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan served as State Program Manager for the Health Insurance Exchange & Integrated Eligibility System Project. The legacy solution for Medicaid Eligibility processing centered around a mainframe solution that had been supplemented by a **large collection of applications, including more than two applications, COTS applications, more than five external systems, and real-time systems**, to address emerging needs the mainframe could not support. These supplementary solutions were narrowly focused implementations addressing the targeted needs of individual business teams. To support the vision of retiring all these systems and migrating the functionality into a single solution the project involved pulling together several small business groups that owned these solutions and the systems they interfaced with to define what an **aggregated COTS solution** could support. The groups also had to work closely with business, policy, and technical teams to map needs to Affordable Care Act (ACA) guidelines and operations needed to support different classes of beneficiaries with different policies, and the common customer support vendor. The **project impacted more than one thousand users at multiple locations through integration with user facing front-end portals. The contract value of this solution exceeded \$10M.**

Kishan led efforts with technical and functional stakeholders across multiple agencies and the Chief Technology Officer (CTO) to catalog all systems that had to be enhanced, changed, or retired as part of the migration to a HIX/IES solution. Kishan worked with dozens of system owners to plan and execute the changes needed. For example, **Kishan worked closely with application and functional teams to manage Federal Hub, IE, and other critical application integrations.** He also worked closely with business teams mapping the new Affordable Care Act guidelines and policies to the Commonwealth's Medicaid/CHIP solution. Kishan served as a point of contact for business, the many vendor teams involved in the development and implementation of the solution, the Independent Verification and Validation (IV&V) vendor, and various federal entities on cataloging the interfaces and role of the various portals serving the constituents, back-office staff, and customer-service groups, on reporting status for on-going project progress and metrics. Kishan was ultimately responsible for the Worker Portal and all changes to the common case management system, which served MassHealth but had to be extended to support the Health Connector.

Total Duration of all Projects cited to meet the MQ:

103 months

Minimum Qualification ME-S12	A minimum of two (2) years of experience coordinating integration services on a Project similar in size and scale to the CalSAWS.
Project #1	Contact #1
Company Name: Massachusetts Department of Health and Human Services	Contact Name: [REDACTED]
Project Name: Integrated Eligibility and Enrollment (IE&E) Project	Company Name: Massachusetts Department of Health and Human Services
Time Period: 07/01/2019 – 10/28/2022	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Technical Director	
Description of relevant experience:	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan served as the Technical Director for the Commonwealth's Integrated Eligibility & Enrollment system, which is a system that provides customers with a single application to apply for benefits, including health (for both MAGI and non-MAGI populations, including Long Term Support Services), SNAP, TANF, housing, and early education. This IT system is a large and complex solution that runs on Amazon Web Services (AWS) Cloud, **integrates with the six largest systems** within the Massachusetts Executive Office of Health and Human Services (EOHHS), and also integrates with **COTS solutions** such as Azure AD (for IAM), OpenText ExStream, and OpenText Documentum), with several integrations in real time. The solution includes a **portal and mobile application for applicants which supports 2.5 million users and generates 7 million notices a year**, running **multi-tiered processing** in AWS including a **customer and user facing front-end optimized for multiple user interface platforms**. This project has a contract value of over **\$10M**.

Kishan **led integration services** which involved working with the Chief Technology Officer (CTO) and Architecture Review Board (ARB) to manage all technical deliverables and the overall architecture for the solution to apply for and manage benefits across agency programs. In his role, Kishan also led **integration services across all contractor/vendors** and coordinating activities with teams across agencies to construct the solution, manage ARB to review designs proposed by vendors/contractors to confirm alignment with the overall architecture. He worked across the business and technical teams to establish an SDLC model that afforded each workstream as much Agility as possible, while confirming effective oversight through a collection of gate-review milestones and checkpoints (exit/entry reviews) to keep workstreams aligned and deliverables reviewed and approved. As part of his responsibilities, Kishan also identified risks and issues and worked within and across workstreams to propose mitigation strategies as the principal technical coordinator across workstreams, projects, and teams (internal and contractors).

Project #2	Contact #2
Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)	Contact Name: [REDACTED]
Project Name: Medicaid Enterprise Systems (MES) Project	Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)
Time Period: 07/01/2017 – 06/30/2019	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Program Manager, Medicaid Enterprise Systems	
Description of relevant experience:	
<p>Kishan served as the Program Manager for the Medicaid Enterprise Systems (MES) where he oversaw numerous projects and the MES strategic roadmap which blends the strategic and technical needs of the program to support programmatic goals, operational needs, and CMS mandated projects. On this project Kishan led efforts for the CMS mandate to replace the Medicare Card and the Medicare ID number. As the key identifier on all Medicare transactions, the project required 67 applications across EOHHS, including COTS applications, more than five external systems, and real-time integrations, and multi-tiered processing to be reviewed for use of this identifier. This solution impacts more than 2 million users through customer facing front-end for multiple user interface platforms at multiple locations and the project contract value was more than \$10M. The project extensively reworked and tested interfaces with CMS and many trading stakeholders. The Commonwealth was among a small number of states to successfully complete all implementation and testing on time and well below budget.</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan **led integration services** which involved working with functional and technical stakeholders to achieve CMS recommendations to streamline MassHealth systems into a composable architecture with reusable components, shared services, and updates to functionality. Kishan spearheaded integration services by working with multiple project teams to update the MES solution by upgrading the embedded Electronic Data Interchange (EDI) engine with a SaaS solution that allowed MassHealth to migrate off an unsupported solution. This cloud-based service provides flexible scale and utilization based pricing that increases price and function transparency to the business. The integration services work Kishan led enables Masshealth to support over \$1.6B in EDI-based transactions with over 500 direct and indirect consumers and providers. This change, both large and business-critical, required frequent, effective communications, extended periods of testing, and a focused multi-disciplinary team responsible for change-management. As part of his role leading integration services, Kishan worked with stakeholders at the start of testing to ensure a core team staffed with representation from the business groups that most frequently communicated with the trading partners and their IT teams. In addition Kishan led integration by working with customer support teams, project technical staff, and the PMO met daily to assess all issues logged and in crafting all guidance and communication. The result of his leadership is that the time to onboard partners dropped 60% between that team and the integration services team quickly configuring new trading partners or promoting their configuration to production.

Project #3	Contact #3
Company Name: Executive Office of Technology Services and Security	Contact Name: [REDACTED]
Project Name: Medicaid Management Information System (MMIS) Infrastructure Upgrade Project	Company Name: Executive Office of Technology Services and Security
Time Period: 07/01/2015 – 06/30/2017	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Program Manager	
<p>Description of relevant experience:</p> <p>Kishan served as Program Manager working with the Executive Office of Technology Services and Security on the Medicaid Management Information System (MMIS) Infrastructure Upgrade Project. This was principally a replatforming and hardware upgrade project, which integrates more than two applications, including COTS applications, and system with interfaces with more than five external systems, including real-time systems. The project involved working with multiple MassHealth business groups and their client-facing principals to collect input on critical business dates, strategize with these groups on the sequencing and cadence for test windows that would work for trading partners, and a multi-tiered processing and testing to obtain buy-in from all stakeholders before going live which impacted more than 1,000 users at multiple locations through a user-facing front-end system, as the hub of the extended Medicaid eco-system included dozens of state-based systems, and hundreds of external trading partners. This project has a contract value of over \$10M.</p> <p>Kishan led integration services which involved managing the operation model to support a very large collection of web services and hundreds of consumers of these services as part of this upgrade project. In his role, he worked with stakeholders to define entry/exit criteria associated with design, build, test, and implement migrating management of all services to an API management suite which</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
<p>required integration with a team of specialists supporting the security and configuration of these services. Additionally, Kishan spearheaded the definition of a new onboarding process for classes of services to ensure quality and ease the onboarding of trading partners. Lastly, Kishan's integration worked spanned test automation framework, environment, and resources needed to quickly onboard new partners and to validate changes to the services.</p>	
Project #4	Contact #4
Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector	Contact Name: [REDACTED]
Project Name: Health Insurance Exchange & Integrated Eligibility System Project	Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector
Time Period: 11/15/2012 – 06/30/2015 (includes 30 months for 01/04/2013 – 06/30/2015)	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: State Program Manager	
<p>Description of relevant experience:</p> <p>Kishan served as State Program Manager for the Health Insurance Exchange & Integrated Eligibility System Project. The legacy solution for Medicaid Eligibility processing centered around a mainframe solution that had been supplemented by a large collection of applications, including more than two applications, COTS applications, more than five external systems, and real-time systems, to address emerging needs the mainframe could not support. These supplementary solutions were narrowly focused implementations addressing the targeted needs of individual business teams. To support the vision of retiring all these systems and migrating the functionality into a single solution the project involved pulling together several small business groups that owned these solutions and the systems they interfaced with to define what an aggregated COTS solution could support. The groups also had to work closely with business, policy, and technical teams to map needs to Affordable Care Act (ACA) guidelines and operations needed to support different classes of beneficiaries with different policies, and the common customer support vendor. The project impacted more than one thousand users at multiple locations through integration with user facing front-end portals. The contract value of this solution exceeded \$10M.</p> <p>Kishan led integration services which involved implementation of an Integrated Eligibility System to serve as the central point of access to all subsidized health coverage programs. Kishan led a cross-functional set of teams and business units to integrate activities for the design, build, testing and roll out of the Worker Portal and its 29 interfaces. This involved drafting and review of multiple Data Sharing Agreements (DSAs), Inter-Agency Exchange Agreements (IEAs), and the documentation, reviews, and implementation of extensive security and privacy requirements.</p>	
Total Duration of all Projects cited to meet the MQ:	103 months
Minimum Qualification ME-S13	At least two (2) years of Full-Time Equivalent (FTE) experience utilizing traditional and iterative solution delivery methodologies.

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Project #1	Contact #1
Company Name: Massachusetts Department of Health and Human Services	Contact Name: [REDACTED]
Project Name: Integrated Eligibility and Enrollment (IE&E) Project	Company Name: Massachusetts Department of Health and Human Services
Time Period: 07/01/2019 – 10/28/2022	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Technical Director, IE&E	
Description of relevant experience:	
<p>Kishan served as the Technical Director for the Commonwealth's Integrated Eligibility & Enrollment system, which is a system that provides customers with a single application to apply for benefits, including health (for both MAGI and non-MAGI populations, including Long Term Support Services), SNAP, TANF, housing, and early education. This IT system is a large and complex solution that runs on Amazon Web Services (AWS) Cloud, integrates with the six largest systems within the Massachusetts Executive Office of Health and Human Services (EOHHS), and also integrates with COTS solutions such as Azure AD (for IAM), OpenText ExStream, and OpenText Documentum), with several integrations in real time. The solution includes a portal and mobile application for applicants which supports 2.5 million users and generates 7 million notices a year, running multi-tiered processing in AWS including a customer and user facing front-end optimized for multiple user interface platforms. This project has a contract value of over \$10M.</p> <p>Kishan utilized traditional and interactive solution delivery methodologies by working with the project team to gain buy-in to move towards an iterative Agile delivery model. This involved aligning external drivers such as agency partners, project teams, and business partners. In this role Kishan demonstrated command of traditional solution delivery methodologies and worked with business and technical teams to define and manage a blending of approaches to move towards an iterative and Agile methodology. As part of this work he worked with stakeholders to integrate the Continuous Integration / Continuous Development (CI/CD) framework to frequently deliver apps to customers by introducing automation into the stages of app development and the predictability and control for the business. The impact of this work is that the business now benefits from streamlined decision making to scope functionality.</p>	
Project #2	Contact #2
Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)	Contact Name: [REDACTED]
Project Name: Medicaid Enterprise Systems (MES) Project	Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)
Time Period: 07/01/2017 – 06/30/2019	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Program Manager, Medicaid Enterprise Systems	
Description of relevant experience:	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan served as the Program Manager for the Medicaid Enterprise Systems (MES) where he oversaw numerous projects and the MES strategic roadmap which blends the strategic and technical needs of the program to support programmatic goals, operational needs, and CMS mandated projects. On this project Kishan led efforts for the CMS mandate to replace the Medicare Card and the Medicare ID number. As the key identifier on all Medicare transactions, the project required **67 applications** across EOHHS, **including COTS applications, more than five external systems, and real-time integrations, and multi-tiered processing** to be reviewed for use of this identifier. This solution impacts **more than 2 million users** through customer facing front-end for multiple user interface platforms at multiple locations and **the project contract value was more than \$10M**. The project extensively reworked and tested interfaces with CMS and many trading stakeholders. The Commonwealth was among a small number of states to successfully complete all implementation and testing on time and well below budget.

Kishan **utilized traditional and interactive solution delivery methodologies** as part of project efforts to address time to market for new solutions. Kishan spearheaded efforts to improve speed to change and methods for minimizing the impact of changes as enhancements to the delivery methodology, and served as a point of contact, reporting status for on-going project progress and metrics. Kishan led critical discussions – creating and executing plans, processes and reporting procedures – to gain buy-in from technical and business stakeholders to adopt iterative and Agile practices and delivered outcomes by increasing the number of releases from four to ten releases per year, minimizing the impact of changing business priorities, and giving businesses a more streamlined way of communicating changes to requirements through the iterative solution delivery methodology that was defined.

Project #3	Contact #3
Company Name: Executive Office of Technology Services and Security	Contact Name: [REDACTED]
Project Name: Medicaid Management Information System (MMIS) Infrastructure Upgrade Project	Company Name: Executive Office of Technology Services and Security
Time Period: 07/01/2015 – 06/30/2017	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Program Manager	
Description of relevant experience:	
<p>Kishan served as Program Manager working with the Executive Office of Technology Services and Security on the Medicaid Management Information System (MMIS) Infrastructure Upgrade Project. This was principally a replatforming and hardware upgrade project, which integrates more than two applications, including multiple COTS applications, and system with interfaces with more than five external systems, including real-time systems. The project involved working with multiple MassHealth business groups and their client-facing principals to collect input on critical business dates, strategize with these groups on the sequencing and cadence for test windows that would work for trading partners, and a multi-tiered processing and testing to obtain buy-in from all stakeholders before going live which impacted more than 1,000 users at multiple locations through a user-facing front-end system, as the hub of the extended Medicaid eco-system included dozens of state-based systems, and hundreds of external trading partners. This project has a contract value of over \$10M.</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan **utilized traditional and interactive solution delivery methodologies** with the Architecture Review Board (ARB) with a focus on two business goals: increasing on traditional solution delivery methodologies to Agile DevOps processes, and improved quality and test automation to free up business users from multiple cycles of UAT. This achieved the business outcomes of migrating to a more iterative and Agile delivery methodology to shorten time to deliver, enable flexibility to deliver on high-priority needs, and increased quality through automation. Kishan worked closely with the business to educate and engage stakeholders in improvements to development practices to adopt Agile practices and automated testing. This also meant short-term and long-term goals had to be clarified and widely shared. Based on the criticality, complexity, and scope/size of changes requested the technical team was given the freedom to choose the appropriate solution delivery model (traditional or interactive) best suited to meet Agility and quality measure set for the vendors.

Project #4

Contact #4

Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector

Contact Name: [REDACTED]

Project Name: Health Insurance Exchange & Integrated Eligibility System Project

Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector

Time Period: 11/15/2012 – 06/30/2015

Phone Number: [REDACTED]

Percentage of Time: 100

Email: [REDACTED]

Staff Role: State Program Manager

Description of relevant experience:

Kishan served as State Program Manager for the Health Insurance Exchange & Integrated Eligibility System Project. The legacy solution for Medicaid Eligibility processing centered around a mainframe solution that had been supplemented by a **large collection of applications, including more than two applications, COTS applications, more than five external systems, and real-time systems**, to address emerging needs the mainframe could not support. These supplementary solutions were narrowly focused implementations addressing the targeted needs of individual business teams. To support the vision of retiring all these systems and migrating the functionality into a single solution the project involved pulling together several small business groups that owned these solutions and the systems they interfaced with to define what an **aggregated COTS solution** could support. The groups also had to work closely with business, policy, and technical teams to map needs to Affordable Care Act (ACA) guidelines and operations needed to support different classes of beneficiaries with different policies, and the common customer support vendor. The **project impacted more than one thousand users at multiple locations through integration with user facing front-end portals. The contract value of this solution exceeded \$10M.**

Kishan **utilized traditional and interactive solution delivery methodologies** to propagate a traditional delivery approach that all systems followed. Given the many parties involved in the project, and the need to coordinate releases with multiple systems across multiple interfaces, Kishan also spearheaded efforts to adopt solution delivery methodologies to be iterative for rollout of key changes driven by business needs and policy mandates, serving as a point of contact for all contractors, and reporting status for on-going project progress and metrics. Given the amount of time and effort expended in seeking waivers or approving changes, Kishan spearheaded efforts around solution delivery methodologies for the project to allow components with limited external integrations to adopt a more nimble and iterative process for rolling out changes.

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Total Duration of all Projects cited to meet the MQ:	
103 months	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: Massachusetts Department of Health and Human Services	Contact Name: [REDACTED]
Project Name: Integrated Eligibility and Enrollment (IE&E) Project	Company Name: Massachusetts Department of Health and Human Services
Time Period: 07/01/2019 – 10/28/2022	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Technical Director, Integrated Eligibility and Enrollment	
Description of relevant experience:	
<p>Kishan served as the Technical Director for the Commonwealth's Integrated Eligibility & Enrollment system, which is a system that provides customers with a single application to apply for benefits, including health (for both MAGI and non-MAGI populations, including Long Term Support Services), SNAP, TANF, housing, and early education. This IT system is a large and complex solution that runs on Amazon Web Services (AWS) Cloud, integrates with the six largest systems within the Massachusetts Executive Office of Health and Human Services (EOHHS), and also integrates with COTS solutions such as Azure AD (for IAM), OpenText ExStream, and OpenText Documentum), with several integrations in real time. The solution includes a portal and mobile application for applicants which supports 2.5 million users and generates 7 million notices a year, running multi-tiered processing in AWS including a customer and user facing front-end optimized for multiple user interface platforms. This project has a contract value of over \$10M.</p> <p>Kishan brings a high level of transparency and collaboration in working with internal and external stakeholders, building strong relationships along the way. For this project, Kishan's role involved building strong working relationships with business leaders, department directors, and external stakeholders. He served as a trusted advisor and a key part of the strategy planning group run by the Assistant Secretary for Administration and Finance, and later the Special Advisor to the EOHHS Secretary, conveying relevant information to executive-level audiences which include Executive and Steering committees, CMS, and FNS. Kishan was able to leverage strong working relationships with clients and key internal and external stakeholders to facilitate decision making by reaching out to the large network of decision makers or implementors across business, Agency IT, and infrastructure teams and vendors he has cultivated. A critical reason for Kishan being asked to join this project was because of his existing relationships with all key stakeholders, where he's not only communicate progress and service status transparently, but also built credibility and fostered business-partnering relationships. Kishan also facilitated transparency through the dashboards developed and shared at regular governance meetings, and he has helped convey relevant information to executive-level audiences (Executive and Steering committees, CMS, FNS, Capital committee, etc.), and</p>	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
confirmed all key client stakeholders are aware of progress/service status by sharing governance meeting decks with all project stakeholders.	
Project #2	Contact #2
Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)	Contact Name: [REDACTED]
Project Name: Medicaid Enterprise Systems (MES) Project	Company Name: Commonwealth of Massachusetts, Executive Office of Health and Human Services (EOHHS)
Time Period: 07/01/2017 – 06/30/2019	Phone Number: [REDACTED]
Percentage of Time: 30	Email: [REDACTED]
Staff Role: Program Manager, Medicaid Enterprise Systems	
<p>Description of relevant experience:</p> <p>Kishan served as the Program Manager for the Medicaid Enterprise Systems (MES) where he oversaw numerous projects and the MES strategic roadmap which blends the strategic and technical needs of the program to support programmatic goals, operational needs, and CMS mandated projects. On this project Kishan led efforts for the CMS mandate to replace the Medicare Card and the Medicare ID number. As the key identifier on all Medicare transactions, the project required 67 applications across EOHHS, including COTS applications, more than five external systems, and real-time integrations, and multi-tiered processing to be reviewed for use of this identifier. This solution impacts more than 2 million users through customer facing front-end for multiple user interface platforms at multiple locations and the project contract value was more than \$10M. The project extensively reworked and tested interfaces with CMS and many trading stakeholders. The Commonwealth was among a small number of states to successfully complete all implementation and testing on time and well below budget.</p> <p>Kishan brings a high level of transparency and collaboration in working with internal and external stakeholders, building strong relationships along the way. Kishan was responsible for interactions with leadership, Commonwealth personnel (internal stakeholders), contractors, and other invested parties was a key reason for the quick development of the framework of KPIs and SLAs with active participation from all MES stakeholders. Kishan worked directly with critical stakeholders and was able to recruit or team with key players at the Commonwealth with relationships with external service providers to create a relationship the project could tap into. Prior tabletop exercises that Kishan led with service providers and vendors supporting state services saw little push-back when EOHHS and executive-level stakeholders proposed folding these measures into their service contracts. Kishan was also responsible for ensuring client is aware of progress/service status; and building credibility and fostering business-partnering relationships.</p>	
Project #3	Contact #3
Company Name: Executive Office of Technology Services and Security	Contact Name: [REDACTED]

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Project Name: Medicaid Management Information System (MMIS) Infrastructure Upgrade Project	Company Name: Executive Office of Technology Services and Security
Time Period: 07/01/2015 – 06/30/2017	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Program Manager	
Description of relevant experience:	
<p>Kishan served as Program Manager working with the Executive Office of Technology Services and Security on the Medicaid Management Information System (MMIS) Infrastructure Upgrade Project. This was principally a replatforming and hardware upgrade project, which integrates more than two applications, including COTS applications, and system with interfaces with more than five external systems, including real-time systems. The project involved working with multiple MassHealth business groups and their client-facing principals to collect input on critical business dates, strategize with these groups on the sequencing and cadence for test windows that would work for trading partners, and a multi-tiered processing and testing to obtain buy-in from all stakeholders before going live which impacted more than 1,000 users at multiple locations through a user-facing front-end system, as the hub of the extended Medicaid eco-system included dozens of state-based systems, and hundreds of external trading partners. This project has a contract value of over \$10M.</p> <p>Kishan brings a high level of transparency and collaboration in working with internal and external stakeholders. Kishan collaborated with the Executive Office of Technology Services and Security to migrate MMIS a private cloud (MassCloud). He worked with Commonwealth business and technical internal stakeholders and external vendors to achieve timely integration through building and maintaining strong working relationships with the clients and key stakeholders. He communicated relevant information on progress and service status to executive leadership and confirmed client awareness of progress/service status, while building credibility with business-partnering relationships. Throughout the course of the project there was no downtime experienced during migration, operating costs were lowered, and the team successfully met the deployment timeline.</p>	
Project #4	Contact #4
Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector	Contact Name: [REDACTED]
Project Name: Health Insurance Exchange & Integrated Eligibility System Project	Company Name: Massachusetts Department of Health and Human Services & Massachusetts Health Connector
Time Period: 11/15/2012 – 06/30/2015 (includes 30 months for 01/04/2013 – 07/04/2014)	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: State Program Manager	
Description of relevant experience:	

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE

Kishan served as State Program Manager for the Health Insurance Exchange & Integrated Eligibility System Project. The legacy solution for Medicaid Eligibility processing centered around a mainframe solution that had been supplemented by a **large collection of applications, including more than two applications, COTS applications, more than five external systems, and real-time systems**, to address emerging needs the mainframe could not support. These supplementary solutions were narrowly focused implementations addressing the targeted needs of individual business teams. To support the vision of retiring all these systems and migrating the functionality into a single solution the project involved pulling together several small business groups that owned these solutions and the systems they interfaced with to define what an **aggregated COTS solution** could support. The groups also had to work closely with business, policy, and technical teams to map needs to Affordable Care Act (ACA) guidelines and operations needed to support different classes of beneficiaries with different policies, and the common customer support vendor. The **project impacted more than one thousand users at multiple locations through integration with user facing front-end portals. The contract value of this solution exceeded \$10M.**

Kishan brings a high level of transparency and collaboration in **working with internal and external stakeholders**. Kishan **coordinated 168 Commonwealth internal stakeholders across 13 different projects in 6 countries and reported to Commonwealth executive leadership and federal oversight groups on the program's progress**. He oversaw all work on the IT infrastructure and IES-related activities, and he later led the EOHHS reporting team. Kishan utilized years of experience to **coordinate service integration between Commonwealth and federal government systems and vendor hosted solutions**. He capitalized on his networking engagement expertise to build and maintain strong working relationships with clients and key stakeholders while communicating relevant information to executive leadership, confirming client **awareness of progress/service status**, and building credibility with business relationships.

Total Duration of all Projects cited to meet the MQ:

103 months

1.4 M&E Transition Manager, Michael Henry

M&E TRANSITION MANAGER					
PART 1 – RÉSUMÉ					
Contractor	Deloitte Consulting LLP				
Candidate Name	Michael Henry				
Position in the Company	Consulting Managing Director	Length of Time in Position	3 years Overall time at company (19 years 5 months)		
Project Position and Responsibilities	<p>Michael's role as M&E Transition Manager, will span the M&E transition period. This position is tasked with planning, coordinating, and completing the transition for all M&E responsibilities and functions from the existing contract to the new M&E contract resulting from this RFP. Responsibilities include: Managing all CalSAWS M&E Transition-In activities from the incumbent contractor and ensuring a successful transition; Developing, maintaining, and delivering the CalSAWS M&E Transition-In Plan (M&E TIP); Collaborate with the incumbent contractors to ensure a smooth transition of all M&E components of CalSAWS; Minimize impact on CalSAWS end users and county business operations during the transition; Assist the Consortium, Counties, Project Sponsors, and Program Partners in understanding transition-in activities, timelines, and impacts on other Consortium initiatives, system CalSAWS releases, and Tasks; Work closely with the Infrastructure Transition Manager to plan, manage, and execute transition activities to support alignment across transition teams; Identify and communicate with internal and external stakeholders on transition activities; Work with the M&E Project Manager in closing out Transition activities.</p>				
Skills & Qualifications for Project Position	<p>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.</p>				
Relevant Experience (Add additional tables as needed)					
Project Title	State of California – California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)				
Position Title	Engagement Transition Manager				
Begin Date	12/02/2019	End Date	09/30/2020	# of Months	9
Scope and Description of Responsibility	<p>The scope of the CalHEERS project include managing California's large and complex eligibility system, CalHEERS. This Maintenance & Operations project provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications. The responsibilities of the Engagement Transition Manager include coordinating knowledge transfers and ongoing transition activities with</p>				

M&E TRANSITION MANAGER					
	state and incumbent vendor leaders, updating project plans, developing and managing the transition plan, publishing status reports, gate review completion summaries, submitting deliverables, and tracking acceptance.				
Skills Utilized and Experience Attained	The skills utilized by Michael are management skills to coordinate knowledge transfer by managing the transition plan, publishing status reports, and submitting deliverables. The experiences attained by Michael include leading the successful transition of the IT operations support from the incumbent vendor, developing and maintaining the Transition Plan, serving as a primary point of contact for overall transition activities, communications, and escalation; and managing the transition team and defining the approach to facilitate productive discussions with client leaders to minimize the impact of transition activities on end-users. Attained experience in proactively anticipating issues and prioritizing activities for a smooth transition.				
Project Title	[REDACTED]				
Position Title	System Engineering Transition Director				
Begin Date	06/01/2018	End Date	12/01/2019	# of Months	18
Scope and Description of Responsibility	The scope of the [REDACTED] project included providing services to the [REDACTED] Information Technology (IT) infrastructure. The responsibilities of the System Engineering Transition Director included employing Project Management Professional (PMP) methodologies to coordinate with government officials and vendors to facilitate the transition in accordance with critical deadlines, and leading the transition of the IT Service Desk and End User Services team to increase ticket hygiene and transparency while improving ticket closure efficiency, and providing information technology services for the [REDACTED].				
Skills Utilized and Experience Attained	The skills utilized by Michael were providing strategic guidance to the project management team on the transition's technical and program management aspects and serving as a primary point of contact for overall transition activities and escalation. The experiences attained by Michael were leading the successful transition of infrastructure and IT operations support for the portfolio of 215 applications from the incumbent vendor in 90 days, and guiding project management during maintenance and stabilization periods to minimize the end-user impact of transition activities.				
Project Title	State of Oregon - ONE Medicaid Eligibility Program				
Position Title	Engagement Transition Manager				
Begin Date	11/01/2015	End Date	02/01/2018	# of Months	27
Scope and Description of Responsibility	The scope of the ONE Medicaid Eligibility Program was to provide maintenance and operations for the Modified Adjusted Gross Income (MAGI) Medicaid worker eligibility portal and develop an integrated eligibility system for the State's non-MAGI Medicaid, Supplemental Nutrition Assistance (SNAP), Temporary Assistance for Needy Families (TANF), and Employment Related Day Care (ERDC) programs. The responsibilities of the Engagement Transition Manager included leading the initial transition and subsequent application maintenance to perform essential activities necessary for the routine maintenance of the CSE application, analyzing, designing, and developing, and testing application changes; managing ongoing application enhancements that included innovations to worker productivity, such as automated renewals.				

M&E TRANSITION MANAGER					
Skills Utilized and Experience Attained	The skills utilized by Michael were, collaborating with contractors and communicating transition activities, timelines, and impacts; and his experience developing a transition plan. The experiences attained by Michael were, managing the Maintenance and Operations services for the State of Oregon's ONE Medicaid Adjusted Gross Income (MAGI) Eligibility system, leading change management activities to transition operations and system usage for the State's Medicaid organization, serving hundreds of thousands of users; working closely with the incumbent vendor and client teams to plan and execute transition activities across teams; and status/progress reporting and client executive briefings to assist in client partner understanding of transition activities.				
Project Title	State of Nevada Supported State Based Marketplace (SSBM) Transition				
Position Title	Transition Project Manager				
Begin Date	04/01/2014	End Date	10/30/2015	# of Months	18
Scope and Description of Responsibility	The scope of the SSBM project was to support State of Nevada transition it's Silver State Health Insurance Exchange (Nevada Health Link) to connect with the Federally Facilitated Marketplace (FFM) under Supported State Benefits Marketplace (SSBM) model. This resulted in transitioning key eligibility and enrollment functions including account transfer, integration with the FFM and the functional and technical requirements of the Division of Welfare Supportive Services (DWSS) and the Nevada Self Service Portal (SSP). The responsibilities of the Transition Project Manager included, working with the Infrastructure Transition Manager to plan, manage, and execute transition activities to support alignment across transition teams; communicating all activities and timelines with the contractor to support alignment.				
Skills Utilized and Experience Attained	The skills utilized by Michael were, working with schedule, budget, quality, and project management to deliver on this transition project. The experience attained by Michael were, serving as the Transition Project Manager to manage State of Nevada Supported State Based Marketplace (SSBM) Transition project, and managing design, development, testing and deployment of all custom components built as per system requirements.				
Education (add rows as needed)					
Years	Course of Study			School	
05/2003	Bachelor's of Science in Management Sciences and Information System			Pennsylvania State University	
Professional Certifications or Designations (add rows as needed)					
Certification or Designation		Organization		Dates	
Project Management Professional (PMP)		Project Management Institute		03/2012	
ITIL Foundation Level		AXELOS		05/2021	
Capability Maturity Model Integration (CMMI) Level 3		CMMI Institute		04/2013	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: State of California	Contact Name: [REDACTED]
Project Name: California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)	Company Name: State of California
Time Period: 12/02/2019 – 09/30/2020 (Includes 9 months transition)	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Engagement Transition Manager	
<p>Description of relevant experience:</p> <p>Michael served as Engagement Transition Manager for California's large and complex eligibility system, CalHEERS, which integrates 10 applications, 2 COTS applications, interfaces with 41 external systems, including 30 real-time applications. This Maintenance & Operations project provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications. Deloitte was 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. This system is accessed by more than one thousand users at multiple locations, includes multi-tiered processing, including a customer interface, with a contract value exceeding \$10M. 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 7.7M consumers in multiple locations to apply for health coverage since May 2020.</p> <p>As the Engagement Transition Manager, Michael was a primary point of contact for performing operational transition including overall activities, communications, and escalations. He managed and supported alignment across the transition team and facilitated productive discussions with client leaders in understanding transition- activities, timelines, and impacts. He utilized his strengths in leadership and communication to lead knowledge transfer sessions by directing the transition plan, publishing status reports, and submitting deliverables. Michael gave strategic input and guidance to the project management team during the maintenance of technical and management aspects of the CalHEERS engagement. Under his leadership, the team successfully transitioned the system from the 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. Michael was adept at working with stakeholders to anticipate issues, manage critical-path activities, and working with executives to prioritize and execute. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.</p>	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
Project #2	Contact #2
Company Name: [REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Time Period: 06/01/2018 – 12/01/2019 (includes 3 months transition for 06/01/2018 – 09/01/2018)	[REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: System Engineering Transition Director	
Description of relevant experience:	
<p>Michael served as System Engineering Transition Director for the [REDACTED] Enterprise Management Information Technology Services (EMITS) project. This Technical Services Directorate is responsible for providing Information Technology (IT) services for [REDACTED] organization while supporting the information requirements of the [REDACTED]. Deloitte was engaged to deliver IT support services and solutions that span the entire spectrum of existing and future technical environments, hardware and software systems, and lifecycle applications in support of both its unclassified Non-secure Internet Protocol Router Network (NIPRNET) and classified Secure Internet Protocol Router Network (SIPRNET) environments. The goal was to enable [REDACTED] to consolidate its legacy applications currently residing in multiple data centers on SIPRNET and NIPRNET environments, by migrating these applications to a primary and failover site, while maintaining high-level network availability, secure operations, and quality customer support. This solution integrates 500 applications with 23 COTS applications, interfaces with more than 400 external systems, at least one of which is real-time. In addition, the solution was used by more than 3,500 users in multiple locations through multi-tiered processing, and a user facing front-end. The project contract value exceeded \$10M.</p> <p>As the System Engineering Transition Director, Michael performed operational transition activities and assembled the transition team and coordinated strategy with client leaders. He provided oversight and acted as a point of contact for transition activities. He published gate review summaries and tracked deliverables. Michael led the transition of IT infrastructure operations for 215 applications in 90 days. By the conclusion of the transition, the IT service desk and end-user services increased ticket closure efficiency. Michael managed the change management of new project team organization structure, established a strong client relationship, assembled the transition team, and defined the approach to facilitate productive discussions with client leaders and ensured a successful transition. Michael played a key role in providing oversight, strategic input, and guidance to the project management team during the stabilization and ongoing maintenance phases on technical and project management aspects and assisted in resolution of project. He served as a primary point of contact for overall transition activities, communications, and escalation. With his strong communication and leadership capabilities, he worked with government and incumbent vendor to coordinate knowledge transfer and ongoing transition activities, including updating the project plan, developing, maintaining, delivering, and managing the transition plan, publishing status reports, gate review completion summaries and submitting deliverables, and tracking acceptance. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with</p>	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.	
Project #3	Contact #3
Company Name: State of Oregon	Contact Name: [REDACTED]
Project Name: ONE Medicaid Eligibility Program	Company Name: State of Oregon
Time Period: 11/01/2015 – 02/01/2018 (includes 6 months transition for 11/01/2015 – 05/01/2016)	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Engagement Transition Manager	
Description of relevant experience:	
<p>Michael served as the Engagement Transition Manager for the Oregon Health Authority (OHA) Michael led the transition to a state-based eligibility determination solution for supporting the eligibility determination and case management of its MAGI Medicaid caseload. The ONE system is a fully functional MAGI Medicaid Eligibility Determination application and is integrated with MMIS for real-time transfer of eligibility information. The solution includes an integration with more than two applications, COTS applications, more than five external systems, including bidirectional interface with the Federal Facilitated Marketplace (FFM) to transfer applications and eligibility results. ONE includes a 24x7 accessible single, integrated online application (Self-Service portal) serving more than 1,000 users at multiple locations through a customer user facing front end with a smooth user experience along with a Worker Portal that provides workers with eligibility and case management features for application intake and processing, workflow, case maintenance, renewals, and interfaces. This project is a large and complex IT project which integrates more than two applications, more than one COTS application, interfaces with more than five external systems, with more than one in real-time. The solution is accessed at multiple locations by at least one thousand (1,000) users at multiple locations and has a multi-tiered processing front-end optimized user interface platform. The contract value exceeds \$10M.</p> <p>As the engagement manager, Michael performed various transitional and operational activities and managed the Maintenance and Operations services for the State of Oregon ONE MAGI Medicaid Eligibility system which included change management activities to transform operations and system usage for the State's ~300 worker organization and more than 1,000 end users. Throughout the project, Michael led the essential activities necessary for the routine maintenance of the application, including analysis, design, development and testing of application changes. He also managed training and user adoption curriculums across centralized application processing sites. Michael was responsible for status/progress reporting and client executive briefings, owned communication with internal and external stakeholders including managing the agencies interaction with community partners. Michael led Application Maintenance Services to perform essential activities necessary for the routine maintenance of the CSE application, including analysis, design, development and testing of application changes. He also managed ongoing application enhancements that included innovations to worker productivity such as automated renewals. As the Project Manager, Michael led transition training and user adoption curriculums across centralized application processing sites. He managed progress reporting, executive client briefings, and agency interaction with a community partner to impart awareness of crucial transition activities. In addition, Michael also worked with executives to develop</p>	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.	
<div> <div>Total Duration of all Projects cited to meet the MQ:</div> <div>54 months</div> </div>	
Minimum Qualification 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.
Project #1	Contact #1
Company Name: State of California	Contact Name: [REDACTED]
Project Name: California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)	Company Name: State of California
Time Period: 12/02/2019 – 09/30/2020 (Includes 9 months transition)	Phone Number: [REDACTED]
Percentage of Time: 100	Email: [REDACTED]
Staff Role: Engagement Transition Manager	
<p>Description of relevant experience:</p> <p>Michael served as Engagement Transition Manager for California's large and complex eligibility system, CalHEERS, which integrates 10 applications, 2 COTS applications, interfaces with 41 external systems, including 30 real-time applications. This Maintenance & Operations project provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications. Deloitte was 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. This system is accessed by more than one thousand users at multiple locations, includes multi-tiered processing, including a customer interface, with a contract value exceeding \$10M. 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 7.7M consumers in multiple locations to apply for health coverage since May 2020.</p> <p>As the Engagement Transition Manager, Michael oversaw the successful transition of CalHEERS and critical elements such as developing, maintaining, and delivering the transition plan. He coordinated with incumbent contractors to share knowledge and provide strategic input for minimizing the impact on end users. He assisted the client with technical and management aspects to guide them to a smooth transition in accordance with crucial deadlines. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.</p>	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
Project #2	Contact #2
Company Name: [REDACTED]	[REDACTED]
[REDACTED]	
Time Period: 06/01/2018 – 12/01/2019 (includes 3 months transition for 06/01/2018 – 09/01/2018)	
Percentage of Time: 100	
Staff Role: System Engineering Transition Director	
Description of relevant experience:	
<p>Michael served as System Engineering Transition Director for the [REDACTED] Enterprise Management Information Technology Services (EMITS) project. This Technical Services Directorate is responsible for providing Information Technology (IT) services for [REDACTED] organization while supporting the information requirements of the [REDACTED]. Deloitte was engaged to deliver IT support services and solutions that span the entire spectrum of existing and future technical environments, hardware and software systems, and lifecycle applications in support of both its unclassified Non-secure Internet Protocol Router Network (NIPRNET) and classified Secure Internet Protocol Router Network (SIPRNET) environments. The goal was to enable [REDACTED] to consolidate its legacy applications currently residing in multiple data centers on SIPRNET and NIPRNET environments, by migrating these applications to a primary and failover site, while maintaining high-level network availability, secure operations, and quality customer support. This solution integrates 500 applications with 23 COTS applications, interfaces with more than 400 external systems, at least one of which is real-time. In addition, the solution was used by more than 3,500 users in multiple locations through multi-tiered processing, and a user facing front-end. The project contract value exceeded \$10M.</p> <p>As the System Engineering Transition Director, Michael oversaw the successful transition of EMITS and led transition team deliverables for client leadership. He communicated with internal and external project members to organize transition activities. Michael worked closely with other contractors to ensure a smooth transition cloud for users of 215 different applications. He published gate review summaries and tracked deliverables to align progress across different teams. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.</p>	
Project #3	Contact #3
Company Name: State of Oregon	Contact Name: [REDACTED]
Project Name: ONE Medicaid Eligibility Program	Company Name: State of Oregon

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE	
Time Period: 11/01/2015 – 02/01/2018 (includes 6 months transition for 11/01/2015 – 05/01/2016)	Phone Number: [REDACTED]
Percentage of Time: 100	[REDACTED]
Staff Role: Engagement Transition Manager	
Description of relevant experience:	
<p>Michael served as the Engagement Transition Manager for the Oregon Health Authority (OHA) Michael led the transition to a state-based eligibility determination solution for supporting the eligibility determination and case management of its MAGI Medicaid caseload. The ONE system is a fully functional MAGI Medicaid Eligibility Determination application and is integrated with MMIS for real-time transfer of eligibility information. The solution includes an integration with more than two applications, COTS applications, more than five external systems, including bidirectional interface with the Federal Facilitated Marketplace (FFM) to transfer applications and eligibility results. ONE includes a 24x7 accessible single, integrated online application (Self-Service portal) serving more than 1,000 users at multiple locations through a customer user facing front end with a smooth user experience along with a Worker Portal that provides workers with eligibility and case management features for application intake and processing, workflow, case maintenance, renewals, and interfaces.</p> <p>As the Project Manager, Michael led training and user adoption curriculums for the transition effort. He worked with other contractors to align progress across teams and communicate with stakeholders. He led Application Maintenance services to ensure that program changes and enhancements were well integrated into the transition engagement. An important aspect of this work was also the coordination with the infrastructure operations team for the transition. In addition, Michael also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition. Mike collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.</p>	
Total Duration of all Projects cited to meet the MQ:	54 months