

13.9 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: ACCENTURE	
Reference Agency Name: State of California – California Department of Public Health (CDPH)	
Project Name: California Vaccine Management Project (CalVAX)	
Contact Person/Title: [REDACTED] [REDACTED] [REDACTED]	Phone: [REDACTED]
Address: [REDACTED] [REDACTED]	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Project description</p> <p>The California Department of Public Health (CDPH) is a department of the Health and Human Services Agency of the State of California (the "State"). CDPH is responsible for public health across the State—setting policy and delivering services to California's 39 million residents directly through the State or the 61 County or City Local Health Authorities. CDPH delivers services and oversees eligibility determination for a broad range of Public Health Social Services programs such as the nutrition program for Women, Infants, and Children (WIC) and the Maternal, Child, and Adolescent Health program. In addition to its social services mandate, the CDPH is charged with overseeing infectious disease control and prevention, leading the State's response to the COVID-19 pandemic.</p> <p>When COVID-19 vaccines finally became available, California public health officials wanted to get them to Californians as soon as possible and set an ambitious goal of immunizing 70% of their 39 million residents within six months. CDPH contracted with Accenture in December 2020 to launch myCAVax, an innovative large-scale system integration program to help the State of California reach this goal.</p> <p>Technical solution</p> <p>CalVAX operations is comprised of myCAVax, MyTurn, and MyTurn Volunteer. The CalVAX solution includes a multi-tiered architecture, including four front-end applications optimized for various user interface platforms. Accenture used MuleSoft as the strategic integration and application programming interface (API) platform. This integration connects with more than</p>	

seven external systems to integrate the new Salesforce-based vaccine management system with other state and federal systems for the CDPH. Salesforce Lightning Flow Builder, a process automation tool that "calls" MuleSoft's API, is an example of real-time integration delivered by Accenture. The solution interacts with the California Immunization Registry (CAIR2), a COTS solution provided by Gainwell, in real-time to return the validity of healthcare providers.

The MyTurn website determines eligibility for vaccines and schedules over 625,000 appointments per month. The MyTurn Volunteer website helped volunteers connect with the program to expedite the administration of vaccines. In total, over 10 million vaccination appointments have been scheduled. The myCAVax solution alone supports **20,000 internal end users** and **2,000,000 external users** at multiple locations.

Accenture services delivered

To support the statewide vaccination campaign, the CDPH joined forces with Accenture, the Federal Emergency Management Agency (FEMA), and Blue Shield of California to develop a secure, integrated vaccine management solution. Through this partnership, more than 8,000 vaccines were administered to Californians every day throughout the pandemic. As the **prime contractor**, Accenture developed and oversaw CalVAX operations. Accenture managed multiple development teams working in parallel and delivered incremental product features to administer vaccinations as quickly as possible. Using the Agile software development life cycle (SDLC) approach, Accenture configured and launched these solutions in a matter of weeks, with additional critical functionality deployed every two weeks.

Throughout its contract period, Accenture has supported Tier 1, 2, and 3 **service desk activities** using the Information Technology Infrastructure Library (ITIL) standards and framework. As part of maintenance, Accenture provides a tightly integrated organization to support CalVAX and is responsible for infrastructure operations including environment management, capacity management, performance tuning, monitoring, and error handling, patching and upgrades, and asset and configuration management. Accenture also supports application operations such as batch operations, integration with state, agency or external interface partners/systems, and incident/problem and defect management. Security activities include auditing, disaster recovery and business continuity, security monitoring and error handling, and security incident management.

Accenture interacts with four other vendors—Blue Cross/Blue Shield, Maximus, Gainwell, and Lyniate—in a **multi-contractor environment** for cloud-based areas including interfaces, data stores, software, services, migration, and mining.

Accenture's **contract value of CalVAX is \$280 million** and the contract ends in June 2023.

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

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

Yes, the contractor delivered high quality deliverables under extreme time pressures. The contractor developed a vaccine management system for COVID that included ordering, enrollment, patient appointments, clinic management, and volunteer coordination.

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

Yes, the COVID response was extremely unpredictable and required that we pivot at a moments notice. Accenture was a dedicated partner and worked closely with us to meet all of the demands with unreasonable deadlines and under extreme pressure.

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

Yes, we were in close communication with all aspects of the project. Accenture was available at all hours, on weekends, and extremely responsive.

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

There were times where there was staff turnover during key times due to staff illness or burnout. Given the high demands, I suppose that is to be expected.

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?

There were other partners such as Skedulo and Mulesoft. Accenture managed the tasks of these partners without issue.

6. Was the Project a success?

Yes, it is unbelievable that we were able to develop and launch new vaccine management systems during a pandemic. The systems weren't perfect when we launched them due to time constraints, but we worked diligently together to iterate and improve them every week.

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

Yes, absolutely.

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

[REDACTED]

Title

[REDACTED]

Date

[REDACTED]

Signature

[REDACTED]

FIRM REFERENCE: FIRM NAME	
Reference Agency Name: United States Department of Health and Human Services Centers for Medicare and Medicaid Services (CMS)	
Project Name: HealthCare.gov/Federally Facilitated Marketplace (FFM)	
Contact Person/Title: [REDACTED]	Phone: [REDACTED]
Address: [REDACTED] [REDACTED]	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Project description</p> <p>Through the 2010 Patient Protection and Affordable Care Act (ACA), new health insurance exchanges were created at both the state and federal levels. These exchanges are public-private marketplaces where Americans can securely shop for health insurance plans and apply for a tax subsidy simultaneously with multiple insurance companies. HealthCare.gov, the eligibility website for the federal exchange, is the front door for the Federally Facilitated Marketplace (FFM). Ancillary systems include FFM Bridge and Federally Facilitated Exchanges (FFE).</p> <p>Technical solution</p> <p>FFM is a cloud-based solution and uses a multi-tiered processing architecture, including a presentation tier optimized for multiple user interface platforms (such as laptops and mobile devices), an application tier, and a data tier. The system integrates with several COTS solutions (e.g., Salesforce and Interactive Voice Response (IVR)), which integrate with custom applications (e.g., Java and Python) that are developed, deployed, and operated on Confluence and Red Hat software. The system was migrated to the Amazon Web Services (AWS) cloud platform in 2019 and has been running on that platform since then. FFM connects with over 800 issuers enabling data sharing and claims processing in the cloud in compliance with CMS analytical algorithms. A feature of the FFM system is its innovative way of adapting to meet the unique needs of each of the 50 states through interfaces with health insurance companies and the IRS. Some states use the system's full functionality, and others use the system solely for essential eligibility functions. FFM consists of seven subsystems and has real-time integration with external systems (e.g., IRS, SSA, and DHS) to validate eligibility. FFM is utilized in multiple locations across the country annually by over 1,000 internal and 10 million external users to enroll in qualified health insurance plans.</p> <p>Accenture services delivered:</p> <p>A rescue of the website began in November 2013, and in January 2014, the federal government hired Accenture as the prime contractor for application maintenance, system modifications, cloud-based operations, project management, cybersecurity vulnerability mitigation, network and system engineering, capacity planning, performance testing and monitoring, and batch processing. In just six weeks, Accenture mobilized more than 500 skilled professionals to transition the system from the original vendor to Accenture at an unprecedented speed.</p>	

Working closely with the original vendor, Accenture quickly achieved CMS' objective to stabilize and enhance HealthCare.gov. A collaborative and comprehensive transition plan was created that mitigated the risk and enabled Accenture to begin hands-on delivery. Within eight weeks, Accenture delivered significant technical enhancements to the website, stabilizing it during the peak of HealthCare.gov's initial enrollment period. This enabled millions of Americans to securely enroll in health insurance.

Accenture is responsible for stabilizing, securing, and improving the website, maintaining hardware/software, and developing additional systems and interfaces while managing maintenance and operations. In addition to providing issuers with a complete data processing environment, Accenture developed an innovative solution that each issuer owns and operates. The FFM modernization projects for HealthCare.gov include Accenture as the prime contractor, more than six other vendors responsible for different areas of the system, contractors in all 50 states, insurance companies, and the IRS.

The FFM Service Desk, a multi-tier service desk, is managed and operated by Accenture in partnership with CMS. CMS is responsible for Tier 1 support. Accenture is responsible for Tier 2 and Tier 3 support using the Information Technology Infrastructure Library (ITIL) standards and framework. Additional support services include security, maintenance, and system interoperability. More than 50,000 issues were triaged and resolved by the FFM Service Desk between 2015 and 2022.

Accenture has successfully operated through seven open and special enrollment periods in collaboration with CMS and other FFM stakeholders to support 45 million+ enrollments and \$200 billion+ in total payments since 2015. Accenture's contract has been renewed three (3) times and is ongoing through January 10, 2026, and the contract value is \$1.36 billion over 12 years.

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

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

Accenture provides consistently high-quality deliverables. Accenture has received a quality score of "Exceptional" for seven consecutive years in the CMS CPAR system (Contract Performance Assessment Reporting system). Accenture has supported CMS through nine near-flawless open enrollment periods. Accenture's high quality deliverables are also instrumental in CMS' ability to support ongoing application modernization, enhancement, maintenance, and policy needs. Recent quality highlights include:

- Accenture seamlessly conducted the transition-in activities for the new FFE contract without disrupting critical ongoing Marketplace operations and services.
- Accenture prioritized high-quality delivery in all aspects of their support for the Marketplace
- Accenture was able to continue making progress on key modernization initiatives that will further enhance the quality of the FFM/FFE Consumer and Issuer experience.
- Accenture maintained delivery excellence by delivering 47 releases 100% on- time throughout this period and 750 on-time releases since 2015 (99% on time)
- Accenture has continued to meet and exceed CMS standards for schedule performance

- Accenture launched the new 150% Federal Poverty Level (FPL) SEP to apply new eligibility requirements and expand healthcare access for qualified consumers per new federal policy mandates.
- Accenture enabled CMS' readiness to notify impacted enrollees of upcoming Medicaid eligibility changes by providing critical insight into consumer application data well ahead of the PHE end date in April.
- Accenture enabled more efficient, real-time AT Outbound transfers to States.
- Accenture increased the accuracy of Medicaid/CHIP eligibility, determinations and association application processing by proactively proposing and incorporating new SES system changes.

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

Accenture has established very comprehensive system monitoring to ensure the rapid identification and remediation of emerging issues. They flexibly respond to issues in collaboration with other key stakeholders to minimize disruption to ongoing priorities. CMS has recognized Accenture for 450+ notable achievements specifically related to their flexibility in supporting external vendors tackle unanticipated challenges.

Accenture is responsive to CMS feedback, and flexibly adjusts their team size and skills to best meet CMS' needs. Accenture quickly adapts to new CMS requirements and goes above and beyond to help other CMS contractors (not under contract with Accenture). Accenture's flexibility helps maximize the success of the Federally

Facilitated Marketplace. Overall, Accenture does an exceptional job of maintaining positive and productive working relationships at all levels with the CMS staff and management, as well as with the various other Application Development Organization contracting teams.

Recent maintenance and enhancements flexibility highlights include:

- Accenture remained extremely flexible and adapted to new and emerging CMS Administration and external stakeholder priorities.
- Accenture quickly adjusted plans and schedules to accommodate shifting priorities and deliver on new CMS requested scope changes and additions.
- Accenture was also able to expedite delivery of planned scope items based on new CMS and business stakeholder needs/requests.
- Accenture continued to demonstrate responsiveness and speed in detecting and remediating potential issues before they introduced adverse system, consumer, or stakeholder impacts.
- Accenture pivoted resources and release plans to address emerging CMS needs associated with the Public Health Emergency ending, ensuring readiness to support impacted consumers, as needed.

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

<p>Accenture's communication is excellent. Accenture has been recognized by CMS for 600+ notable achievements specifically related to communication. Accenture provides clear, timely and complete plans, status, and deliverables. Accenture appropriately identifies and escalates risks and provides CMS with clear mitigation approaches and impact assessments. Additionally, Accenture communicates key program information through a large number of weekly meetings that address all aspects of the program. Accenture continues to exhibit top tier management of the FFM Contract. They skillfully maintained and adjusted as needed, to provide the right mix of skilled and qualified staffing resources to support the ongoing and emerging CMS priorities. Overall, Accenture does an exceptional job of maintaining positive and productive working relationships at all levels with the CMS staff and management, as well as with the various other Marketplace Application Development Organization contracting teams.</p>
<p>4. Were there any major issues with Key Staff turnover or replacement?</p>
<p>Accenture is excellent at managing program staff. They have a large number of highly qualified staff and always have the skilled staff CMS requires. Accenture manages any needed transitions smoothly. There have been no program performance issues related to personnel.</p>
<p>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?</p>
<p>Accenture's team includes staff from ~20 subcontracting companies. Most of these companies are small businesses. Their involvement supports CMS' subcontracting objectives and contract-specific subcontracting goals. These subcontractors support all aspects of the program. Accenture has managed subcontractor personnel well, and they operate as a seamless team. There have been no program performance issues related to subcontractors.</p>
<p>6. Was the Project a success?</p>
<p>The FFM program is ongoing, and it continues to be successful. The program has adapted to recent policy requirements for the American Rescue Plan and the CARES act, while concurrently modernizing infrastructure and performing operations successfully.</p>
<p>7. Would you rehire/recommend this Contractor? If not, why not?</p>
<p>Yes, we would recommend Accenture.</p>
<p>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?</p>
<p>We would give Accenture a grade of 10. Accenture has received exceptional Contractor Performance Assessment Reporting System (CPARS) scores for Quality, Schedule, Management, and Cost Control for seven consecutive years.</p>

Other Comments:

No additional comments.

REFERENCE AFFIRMATION AND SIGNATURES

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

Print Name	
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Title	[REDACTED]
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Date	████████
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Signature		
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FIRM REFERENCE: FIRM NAME	
Reference Agency Name: Federal Student Aid (FSA)	
Project Name: Title IV Origination and Disbursement (TIVOD)	
Contact Person/Title: [REDACTED] [REDACTED]	Phone: [REDACTED]
Address: [REDACTED]	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Project Description</p> <p>Common Origination and Disbursement (COD) is the U.S. Department of Education's Office of Federal Student Aid's (FSA) suite of applications to determine eligibility for federal, post-secondary financial aid. Launched in 2003 as a mainframe-based solution, the system processes ~30 million award originations and ~60 million disbursements, totaling nearly \$145 billion in aid annually. To support this financial aid processing, COD includes three websites that provide online services to financial aid recipients and their families, staff at post-secondary institutions, and FSA employees. In 2015, these websites were accessed by over 12.5 million users.</p> <p>To enable cost savings, improve agility, and enhance the security posture, Accenture was hired as the Prime Contractor to modernize COD by re-architecting it to run on a fully automated, modern technology stack and host it on a FedRAMP authorized cloud service provider. The hosting transition occurred in 2015 to establish the DevSecOps platform vision of accommodating the change flexibility and pace expected by the contract. The resulting platform allowed a greater percentage of the available budget to be delivered directly to aid recipients, reducing administrative and operation costs for the federal aid programs, and more securely stored the information of its 83 million unique customers' PII.</p> <p>The realization of the updated platform provided the initial building blocks to enable the transition to AWS GovCloud in 2018. After the re-architecture, the platform evolved to include industry-leading technologies for execution, operations, and development architecture. These changes accommodated the pace of growth, expansion, and maintenance of over 40 applications. This effort included the establishment of a fully automated and containerized development architecture with a focus on DevOps enablement. The migration to AWS transitioned all core components within a single weekend.</p> <p>Since the successful transition, Accenture has assumed website hosting responsibilities from a client-contracted third-party vendor for StudentLoans.gov and ATS, the two public-facing websites which are used by 12.5 million unique users to complete transactions annually. Accenture also rebuilt ~50 school reports, ~400 client reports/queries, and internal operations reports and dashboards to utilize the new reporting data store. Accenture updated 27 interfaces with the new COD solution and converted ~18 billion records from legacy IMS/DB2 databases into a new Oracle- hosted data model with over 700 tables. The AWS system performance exceeds that of the legacy system across a wide variety of business functions and interface processing.</p>	

Reference Questions: For each question below, please provide a comment.	
1. Did the Contractor produce high quality deliverables? Please describe briefly.	Yes, Accenture consistently provides high quality products and services. The work products and Deliverables that they submit are organized and in a clear and easy to read format. They ask and respond to questions regarding work products and Deliverables in a timely and consistent manner.
2. Was the Contractor flexible and willing to work through issues during all stages of the Project?	Yes, Accenture is consistently on or ahead of schedule for meeting milestones and delivering work products and Deliverables. They constantly work with FSA to set the schedules and are flexible when they need to be changed. When changes need to be implemented quickly, Accenture provides reasonable assessments and estimates for getting the work scheduled and completed.
3. Was communication between the Contractor and your organization's Staff open, timely, complete and effective? Please briefly summarize.	Yes, Accenture provides proactive customer service to FSA and ensures that management of the project meets acceptable standards. They retain and promote staff to ensure all levels of workers and managers, and FSA staff are informed and involved in the process of delivering financial aid to FSA's customers.
4. Were there any major issues with Key Staff turnover or replacement?	No.
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?	Yes, Accenture utilizes Small Businesses for both customer service and development work. Accenture is constantly looking for ways to improve services by using small businesses. Their customer service center solution provides an excellent avenue for maximum use of small business utilization.
6. Was the Project a success?	Yes, the overall move to the AWS platform as well as the day-to-day operations of the COD system has been a success.
7. Would you rehire/recommend this Contractor? If not, why not?	Yes, given what I know today about the contractor's ability to perform in accordance with this contract or order's most significant requirements, I would recommend them for similar requirements in the future.

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

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?

Accenture's overall performance rating is: 10

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES

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

Print Name

[REDACTED]

Title

[REDACTED]

Date

[REDACTED]

Signature

[REDACTED]

FIRM REFERENCE: FIRM NAME	
Reference Agency Name: Federal Student Aid (FSA)	
Project Name: Digital & Customer Care (DCC)	
Contact Person/Title: [REDACTED] [REDACTED]	Phone: [REDACTED]
Address: [REDACTED]	Email: [REDACTED]
Describe the services provided:	
<p>Project Objective</p> <p>The U.S. Department of Education (ED) is the agency responsible for education policy within the U.S. Federal Government. ED establishes federal education funding policies, administers and monitors funds, oversees research on America's schools, and focuses national attention on important issues in the American education system.</p> <p>One of ED's key roles in postsecondary education is to determine eligibility for Title IV federal student aid for eligible students and their families. The Office of Federal Student Aid (FSA) is the organization within ED that is responsible for managing Title IV. FSA originates over \$115 billion federal grants, loans, and work-study funds to approximately 10.8 million students at more than 5,600 participating postsecondary schools annually.</p> <p>Historically, federal student aid has been challenging for borrowers to navigate. There were multiple websites with different information that lacked a consistent look, feel, and approach to engage or assist customers. To tackle this, ED created a Next Generation Financial Services Environment (Next Gen) in 2018 – an innovative, streamlined, world-class solution to benefit customers, parents, financial aid administrators (FAAs), and other school partners that work with FSA. The goals of this transformation include achieving greater operational and technical flexibility, cost efficiencies, a consistent and intuitive customer experience, and better outcomes for all stakeholders.</p> <p>Accenture is working with FSA to carry out this critical overhaul of all digital and customer care (DCC) touchpoints. Accenture is working with FSA to create a single phone number for unified point of access and a modernized customer care platform (CCP). On average, this streamlined capability transfers over 3.5 million inbound calls annually, allowing customers and their families to reach a variety of call centers supporting different lines of business. In addition, Accenture is working with FSA to create a single digital front door that consolidates the FSA loan and grant processes. To date, FSA and Accenture have consolidated processes available across FAFSA.ed.gov, FSAID.ed.gov, StudentAid.gov, StudentLoans.gov, BorrowerDischarge.ed.gov, and the NSLDS.ed.gov websites into a single website. In addition, Accenture and FSA have collaborated to create "Aidan," a conversational artificially intelligent (AI) virtual assistant (VA). This is the first use of a VA in the federal loan process by the government, enabling self-service without human intervention. Finally, an updated Marketing and Communications Platform (MCP) delivers personalized communications across a variety of channels including email, short message service (SMS), and social. The MCP sends over 290 million emails annually to customers with a 2021 peak of 5.5 million in a single day.</p>	

Reference Questions: For each question below, please provide a comment.	
1. Did the Contractor produce high quality deliverables? Please describe briefly.	<p>Yes, the accomplishments and deliverables as part of this contract were significant, with releases on an average of every two months that included major customer improvements such as the Loan Simulator and Annual Student Loan Acknowledgement. The mobile app and StudentAid.gov were enhanced, allowing FSA to retire legacy websites. A new employer database was added to the Public Service Loan Forgiveness Help Tool, allowing borrowers to know understand their eligibility for the program prior to applying. The Virtual Assistant was made available to more users enabling self-service and the customer care platform onboarded additional contact centers. All of this was done during a global pandemic. Overall, Accenture successfully delivers on the scope of the contract, including quality deliverables and work products that meet the needs of Federal Student Aids more than 40 million students, parents, and borrowers.</p>
2. Was the Contractor flexible and willing to work through issues during all stages of the Project?	<p>Yes, Accenture has been able to meet the schedule agreed to with Federal Student Aid, including multiple releases with overlapping schedules for which they stayed on track. In one case, the government significantly changed requirements very close to a release date. Accenture was flexible in accommodating the new requirements and was able to expedite the schedule to meet expectations. The result was an improved experience for borrowers to apply for one of FSAs loan forgiveness programs. Additionally, Accenture worked with FSA to respond quickly during the pandemic by getting out communications to FSA customers across multiple customer channels. As a result, over 270 million emails were sent in FY20 to ensure borrowers were aware of the loan payment pause and 0% interest rate under the CARES Act.</p>
3. Was communication between the Contractor and your organization's Staff open, timely, complete and effective? Please briefly summarize.	<p>Accenture management is customer service- oriented, communicative, and responsive. Program management and risk management practices are coordinated and thorough. Requests for changes have been met with flexibility. Any actions requested by FSA have been executed in a cooperative and expedited manner based upon business needs.</p>
4. Were there any major issues with Key Staff turnover or replacement?	<p>No, key personnel meet the qualifications needed and are effective in their roles. Accenture management closely interacts with Federal Student Aid to work out any issues raised with key staff turnover or replacement.</p>

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?

Although this contract does not have a small business subcontracting plan, Accenture diligently works to support small businesses as documented in their requests to subcontract.

6. Was the Project a success?

Yes, this project was a success. The first year of the contract established the foundational platforms and capabilities that enabled success in the second year. The foundation included a single 1-800 number through which customers can reach any FSA contact center, a consolidated digital platform on StudentAid.gov, a command center that provides visibility into contact center data, a customer relationship management tool that provides a 360-degree view of customer interactions, and a marketing and communications tool that provides streamlined and personalized email and text message communications. Outcomes include operational stability, rapid delivery at scale, and continuous innovation.

The second year of the contract included six releases, an average of one release every two months. New features were launched including the Loan Simulator and the Annual Student Loan Acknowledgement. The myStudentAid mobile app was enhanced and its functionality expanded beyond the FAFSA. Legacy websites such as Feedback.ed.gov and BorrowerDischarge.ed.gov were retired as the content and functionality were consolidated into StudentAid.gov. A new employer database was added to the Public Service Loan Forgiveness Help Tool. The Virtual Assistant was made available to more users and the customer care platform onboarded additional contact centers.

The flexibility of the platforms allowed FSA to respond quickly when the pandemic hit and the CARES Act was passed, which included payment suspension and 0% interest for over 40 million of FSAs customers starting in March 2020. Communications were shared across multiple customer channels, including web, email, text, postal mail, social media, and paid media. Over 270 million emails were able to be sent in FY20 and FSAs new Virtual Assistant was able to answer thousands of questions about COVID-19 impacts.

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

Yes, I can attest to the great customer service provided in the areas of project management, contract administration, cost, and delivery under compressed timeframes.

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

FIRM REFERENCE: ACCENTURE	
Reference Agency Name: State of California Consortium IV (C-IV)	
Project Name: Statewide Automated Welfare System (SAWS) C-IV	
Contact Person/Title: [REDACTED]	Phone: [REDACTED]
Address: [REDACTED] [REDACTED]	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Project description</p> <p>In 2001, the Statewide Automated Welfare System (SAWS) Consortium-IV (C-IV) began a project to design and implement a web-based integrated eligibility system to administer a variety of programs in California, including cash assistance (CalWORKs/TANF), food assistance (CalFresh/SNAP), medical assistance (Medi-Cal/Medicaid), and other state and county-specific programs.</p> <p>The C-IV system was implemented in all four original counties by October 2004. Subsequently, the ISAWS Migration Project (which included the 35 former ISAWS counties) began in September 2007 and concluded in August 2010. The C-IV system was shut-down as of September 2021, with the migration of the 39 counties to the CalSAWS platform.</p> <p>Technical solution</p> <p>The C-IV System integrated custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Adobe LiveCycle, Perceptive ImageNow, AWS Connect, and IBM Operational Decision Manager). Additionally, the core eligibility application interfaced with other custom applications (e.g., OCAT, Child Care Portal, and C4Yourself). The system had more than 50 batch and real-time interfaces with external systems including the Statewide Client Index, EBT Host-to-Host, and CalHEERS. At its peak, C-IV supported over 10 million transactions daily. The C-IV system included a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (web browsers, tablets, kiosks), an application tier, and a data tier.</p> <p>As of year-end 2021 (end of contract), this system was used by 39 California counties and served approximately 30% of California's public assistance caseload (approximately 4.8 million Californians). The C-IV System supported over 18,000 internal system users across more than 250 public assistance offices. The C-IV contract value for its 20-year period was over \$1.87 billion.</p> <p>Accenture services delivered</p> <p>Accenture was contracted in 2001 to work on all Design, Development, and Implementation (DDI) activities. Accenture completed implementation of the C-IV system in all four original counties by October 2004. Merced County became operational in March 2004; Stanislaus County in April 2004; Riverside County in August 2004; and San Bernardino County in September 2004. Following the successful implementation of the system, Accenture continued to perform</p>	

application maintenance and maintenance and operations (M&O) services. After the ISAWS counties selected C-IV as their future system, the ISAWS Migration Project began in September 2007 and concluded on schedule in August 2010, with 39 counties successfully using the C-IV System.

As prime contractor for systems integration and M&O, Accenture was responsible for system modifications, system engineering, capacity planning, performance testing and monitoring, batch processing, security, hardware and software management, project management, and a service desk (tiers 1, 2 and 3) using the Information Technology Infrastructure Library (ITIL) standards and framework.

During the contract, Accenture collaborated with multiple contractors responsible for different areas of the system such as Solutions West for training, Hyland Software for maintenance and support for their Perceptive Content solution, Gainwell for central print services, and First Data for QA services. Accenture's responsibilities included the core C-IV eligibility system, C4Yourself—the online portal for applications, an integrated contact center, and imaging technologies, as well as key integrations with the OCAT, CalHEERS, EBT systems, and kiosks and tablets in county lobby areas.

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

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

Yes, Accenture has produced high quality contract and project deliverables, meeting expectations. Ongoing application releases were very high quality.

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

Yes. Accenture was a reliable partner to the C-IV counties.

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

Yes. Accenture communicated in a professional manner, and was timely, complete, and effective.

4. Were there any major issues with Key Staff turnover or replacement?
Accenture retained a robust pool of talent to successfully deliver and maintain the C-IV system.
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?
Yes. Accenture leveraged a key subcontractor to provide Help Desk, central print, and remote maintenance support. No mediation was needed.
6. Was the Project a success?
Yes, Accenture successfully met its requirements, and consistently met service level agreements.
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?
9
Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES	
The undersigned hereby certifies that the foregoing statements are true and correct.	
Print Name	[REDACTED]
Title	[REDACTED]
Date	[REDACTED]
Signature	[REDACTED]

FIRM REFERENCE: STATE OF ARIZONA, ARIZONA HEALTH CARE COST CONTAINMENT SYSTEM (AHCCCS)

Reference Agency Name:

State of Arizona: Arizona Health Care Cost Containment System (AHCCCS)

Project Name:

HEAplus M&O

Contact Person/Title:

[REDACTED]

Phone:

[REDACTED]

Address:

[REDACTED]

Email:

[REDACTED]

Describe the services provided:

- Health-e-Arizona Plus (HEAplus) is the State of Arizona's eligibility determination and case management system that administers public assistance benefits for the Arizona Health Care Cost Containment System (AHCCCS) and the Arizona Department of Economic Security (ADES) agency. HEAplus provides a web-based portal for consumers, eligibility workers, and community assistors and supports eligibility determinations and ongoing case management for benefit programs, including Medicaid, Children's Health Insurance Program (CHIP) (known as KidsCare in Arizona), Medicare Savings Program (MSP), Arizona Long-Term Care System (ALTCS), MyFamilyBenefits (Electronic Benefits Transfer [EBT] portal), SNAP, and TANF.

HEAplus collaborates with county departments and non-county medical assistance (MA) sites to administer MA programs throughout the State of Arizona, as well as the SNAP and TANF programs. The objective of the project is to offer the most accurate, credible, real-time eligibility determinations for the State, which serves over 3,900 internal state workers and over **2.43 million Arizonans**, 1.75 million of whom use the portal (including multiple user groups from the worker portal and self-service portal). The system processes **22,250 daily eligibility cases**. AHCCCS is a **\$20 billion program**

- In October 2020, the AHCCCS, the Medicaid agency responsible for HEAplus, awarded Accenture an initial five-year M&O (Maintenance & Operations) contract to maintain the system by bringing transparency and efficiency to the overall operations of the system. The contract includes the end-to-end maintenance, operations, and enhancements of all system components. Accenture, the Prime Contractor, worked with the incumbent to transition the support of the IaaS footprint for the State of Arizona to Microsoft Azure Cloud. After the successful transition, Accenture began providing comprehensive services to maintain the HEAplus system in Azure Cloud with greater scalability and flexibility for business and policy initiatives. The contract supports a multi-vendor design (AHCCCS, DES & Department of Correction).

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

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

All deliverables were provided as expected and met the acceptance criteria. As a result, the deliverables would be considered high quality. There were several instances where the contractor provided additional deliverables or information above what was requested in the RFP.

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

There were many twists and turns during the transition from the outgoing vendor outside of Accenture's control and they willingly adapted to course corrections.

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

There were several communication standards defined in the RFP (status updates written, status update meetings, communication plans, etc.) The contractor met all the communication requirements timely and also provided adhoc updates and suggestions throughout the project. In summary, the communication was timely, complete and effective.

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

No

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?

All key personnel were contractor employees not sub-contractors. All the Contractor staff that the state personnel worked with directly were contractor employees. Subcontractors were used on the project but not in key positions. It was limited to a few technical positions and those resources appeared to be managed effectively.

6. Was the Project a success?

The project was successful. It met all the required deliverables with less than anticipated disruption. The M&O transition was completed approximately a month earlier than scheduled.

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

We are not permitted to supply opinions or speculation when completing contractor evaluations. That being said, the contractor is in good standing with the State and is eligible for additional services/contracts.

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?

We are not permitted to supply opinions or speculation when completing contractor evaluations. We do not have an official mechanism to rank contractors on this scale. The contractor met all their contractual duties, and the project was completed ahead of schedule and on budget. All deliverables were accepted/approved by the State.

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES	
The undersigned hereby certifies that the foregoing statements are true and correct.	
Print Name	
Title	
Date	
Signature	

FIRM REFERENCE: ACCENTURE	
Reference Agency Name: California Statewide Automated Welfare System (CalSAWS) Consortium	
Project Name: California Statewide Automated Welfare System (CalSAWS) (prior project name was the LEADER Replacement System (LRS), which is now called CalSAWS)	
Contact Person/Title: [REDACTED]	Phone: [REDACTED]
Address: [REDACTED] [REDACTED]	Email: [REDACTED]
Describe the services provided:	
<p>Project description</p> <p>The California Statewide Automated Welfare System (CalSAWS) is an integrated eligibility system built and operated by the CalSAWS Consortium on behalf of the 58 counties of California. CalSAWS supports the counties in administering public assistance programs in California, including cash assistance (CalWORKs/TANF), food assistance (CalFresh/SNAP), medical assistance (Medi-Cal/Medicaid), and other state and county-specific programs.</p> <p>The system first went live in 2015 in Los Angeles County, and at that time, it was known as the LEADER Replacement System (LRS). Migration from an on-premises data center to cloud hosting occurred on October 14th, 2019.</p> <p>Technical solution</p> <p>CalSAWS is the most extensive integrated eligibility system in the United States and is hosted in the Amazon Web Services (AWS) cloud. The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets. The system integrates custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, Adobe Experience Manager, AWS Connect, and IBM Operational Decision Manager). The core eligibility application further integrates with other custom applications (e.g., The core eligibility application further interfaces with other custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal).</p> <p>Supporting over 10 million transactions daily, CalSAWS has more than 50 interfaces, six of which are real-time. The system is currently in production in 42 counties. The system is used by 18,500 internal users daily across 125 locations to support 11 million Californians who receive public assistance. CalSAWS issues more than \$1 billion in benefits each month.</p> <p>By October 2023, all 58 counties will have migrated to this platform. After all counties are migrated to CalSAWS, 41,000 internal users will use CalSAWS daily to support approximately 19 million Californians and issue approximately \$2 billion in benefits each month.</p> <p>Accenture services delivered</p>	

Accenture is one of seven contractors responsible for CalSAWS and has the largest scope of work. Accenture's contract began in November 2012 and is ongoing through April 2025. The contract value is approximately \$1.425 billion. As the prime contractor for systems integration and maintenance and operations (M&O), Accenture is responsible for application maintenance and system enhancements, and cloud-based operations including network engineering, cybersecurity vulnerability mitigations, capacity planning, performance testing and monitoring, and batch processing. Accenture supports hardware and software management, system engineering, data conversion, and project management. Accenture also supports the service desk (tiers 1, 2 and 3) using the Information Technology Infrastructure Library (ITIL) standards and framework.

Accenture is responsible for the core CalSAWS eligibility system, the analytics application, ForgeRock identity solution, contact center technologies, Child Care Portal, and kiosks/tablets in several county lobbies. The CalSAWS Consortium has separate prime contracts for legacy system maintenance (CalWIN), cloud hosting, the public portal (BenefitsCal), imaging (SaaS contract), OCAT, GA/GR Correspondence solution, and print services.

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

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

Yes, Accenture has produced high quality project deliverables, meeting expectations.

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

Accenture has been a reliable partner to the CalSAWS Consortium and our member counties. They acknowledge and work through system performance issues as quickly as possible. However, when updates to requirements were applied, the team did not follow the scope management process timely.

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

Accenture staff communicate in a professional manner and can effectively convey technical solutions to business partners and stakeholders. However, advance notice of database sizing issues and corresponding cost impacts were not brought forward timely.

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

Accenture has retained strong Key Staff talent at the Director level. However, limitations with certain knowledge areas have led to inefficiencies with management of the Consortium's AWS accounts with cost impacts, hardware & software inventory tracking, production operations, and process/control documentation gaps.

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?

Yes. Accenture has leveraged a key subcontractor to provide Help Desk and remote maintenance support. Additional subcontractors are used in the areas of imaging and staff augmentation. No mediation has been needed.

6. Was the Project a success?

Yes. Accenture successfully moved the LRS to a cloud-based platform and migrated the former C-IV counties to CalSAWS, as well as two of the CalWIN counties to date. The application release quality is very high.

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?

8

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES

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

Print Name

Title

Date

Signature

FIRM REFERENCE: ACCENTURE	
Reference Agency Name: State of Kansas, Department of Health and Environment (DHE)	
Project Name: Kansas Eligibility Enforcement System (KEES)	
Contact Person/Title: [REDACTED]	Phone: [REDACTED]
Address: [REDACTED] [REDACTED]	Email: [REDACTED]
<p>Describe the services provided:</p> <p>Project description</p> <p>The Kansas Eligibility Enforcement System (KEES) is a health and human service eligibility system that was developed and implemented to administer the full suite of human service programs. The system first went live in a phased approach, with its first go-live in July 2012 and the final go-live in August 2013. This includes Food Assistance (SNAP), Temporary Assistance for Needy Families (TANF), Child Care, Employment Services, Food Assistance, Employment and Training (FAET and GOALS), Low Income Energy Assistance Program (LIEAP), Automated IV-E Eligibility, Medical assistance programs, including Medicaid (MAGI, E&D, and LTC), CHIP, KanCare, AIDS Drug Assistance Program (ADAP), and several other state-funded programs.</p> <p>The Kansas Department of Health and Environment's (DHE) Division of Health Care Finance and the Kansas Department for Children and Families (DCF) administers human service and medical assistance (MA) programs that serve over 720,000 Kansans annually. In the last two years, the KEES has distributed over \$814 million in benefits to Kansans.</p> <p>The KEES system provides Kansans with greater integration across its programs and online access to health information as an alternative to office visits. The system generates savings through more efficient eligibility processing and much-improved decision-making and compliance controls. Through a flexible and modular technology approach, KEES helps the state more readily and cost-effectively update the eligibility system as Kansan's needs and government policies change over time.</p> <p>Technical solution</p> <p>In January 2020, Accenture migrated KEES onto Oracle Cloud after a nine-month design and implementation process. Within Oracle Cloud, Platform as a Service (PaaS) and Software as a Service (SaaS) are used for application delivery. The Core Logging as a Service (Laas) solutions aggregate components run on Linux and Microsoft Windows. The large and complex solution integrates custom code with multiple COTS applications (e.g., Adobe Experience Manager, Oracle Intelligent Advisor, Oracle Address Verification, Oracle Analytics, Stone Branch, etc.), including the citizen-facing portal, worker eligibility system, and COTS eligibility software.</p> <p>This platform has several portals supported by multi-tiered processing, including a user-facing application optimized for multiple user interface platforms (e.g., laptops and mobile devices). The platform interfaces with over 25 major external systems, including state and local partners for income information, federal partners for social security data, the KMMS (MMIS) system for Kansas, and the federal hub (which is real-time). There are 2,500 internal and tens of thousands of external users in multiple locations.</p>	

Accenture's services delivered

Accenture's contract began in September 2011 and is ongoing through August 31, 2024, with a contract value over **\$100 million**. As the **prime contractor** for KEES, Accenture performs application maintenance, system modifications, cloud-based operations, cybersecurity vulnerability mitigation, network and system engineering, capacity planning, performance testing, performance monitoring, and batch processing. Accenture is also responsible for application design, development, testing, change management, training, conversion, and running a **service desk (tiers 1, 2, and 3 via ServiceNow)** using the Information Technology Infrastructure Library (ITIL) standards and framework. Accenture continues to serve as the prime maintenance and operations vendor responsible for ongoing system maintenance, security, deployments, and enhancements providing day-to-day system operations through effective project management, governance, and communication with Kansas DHE.

Accenture has implemented innovative solutions outside of their original scope, such as digital imaging and artificial intelligence (AI) bots. Accenture is overseeing a project at Kansas DCF to develop an Amazon Chime chat and an enhanced virtual contact center to provide Kansans with an enhanced customer service experience, and to enable agents to handle increased call volume from anywhere.

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

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

Deliverables fall within accepted guidelines and meet requirements. Accenture has also been willing to listen and adjust processes if there are suggestions for quality improvements or better efficiency in an area.

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

Accenture is very flexible and has shown throughout their engagement a willingness to adjust priorities, processes, and resources to fit the needs of the work and the overall team. They are highly engaged with issues and show a quick response as well as a high level of solutioning ability.

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

Accenture communicates appropriately based on the situation and provides all relevant information. They are very open to feedback and willing to adjust if we have a different request. They are also highly responsive to questions and other requests. Overall, Accenture does an effective job communicating. Their presentations are informative, and they adapt to different audiences.

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

No issues related to turnover. Key staff turnover is low. In the event where turnover did occur, Accenture had a skilled replacement to transition to.

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?

Subcontractors are used, mainly for technical components. Since our transition to Oracle Cloud Infrastructure in 2020, Oracle is the largest subcontractor for Accenture on our account. The subcontractors are seamless to us, as Accenture manages them effectively and no state intervention is required.

6. Was the Project a success?

The initial project was delivered in three main phases. Since that time, we have continued to complete enhancement work, transitioned to a cloud hosting environment, and completed a major upgrade. All of these activities were considered to be successful.

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

Yes, we would hire Accenture again. This vendor has met all of their contractual obligations, and they have shown a dedication to quality improvement and a willingness to be flexible and adapt to changing circumstances

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?

I would score this contractor as an 8. Accenture meets their contractual obligations consistently. They have been a very attentive and flexible partner to work with. If an issue does arise, they are responsive and take action to correct it. There are also examples where they have gone beyond the service expected to provide more robust solutions, as in the case of system monitoring for performance. They have also demonstrated a lot of flexibility with planned enhancement releases, as priorities can change quickly as new regulations and policies occur.

Other Comments:

REFERENCE AFFIRMATION AND SIGNATURES

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

Print Name	
Title	
Date	
Signature	

1.1 M&E PROJECT MANAGER STAFF QUALIFICATIONS

M&E PROJECT MANAGER			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	Lisa Salas		
Position in the Company	Managing Director	Length of Time in Position	10 years
Project Position & Responsibilities	M&E Project Manager Project responsibilities will be as defined in RFP section 13.1.3.6.1.		
Skills & Qualifications for Project Position	<p>Skills: Lisa has expert management skills in all nine Project Management Book of Knowledge (PMBOK) elements: integration, scope, time, cost, quality, people, communication, risk, and procurement. She has strong leadership and problem-solving skills. She is proactive and agile, adapts to change easily, and sees the big picture, yet is detail oriented. She has expert-level skills in relevant project management software applications and tools, including the Microsoft Office suite (Timeline and Project), ServiceNow, and Jira. Qualifications: Lisa has worked on large and complex IT health and human services systems in production since 1996 for clients in the United States, Japan, and Australia (MQ ME-S3: Exceeds). She has been a project manager on the CalSAWS delivery team since 2002—including five years as the C-IV Project Application Development & Test Manager and five years as the C-IV Project Manager where she managed scope, time, cost, human resources, risk, quality, integration, and communication for the program (MQ ME-S4: Exceeds). She has experience supervising 300 resources on large and complex IT systems (MQ ME-S5: Exceeds), and she has built and maintained strong working relationships with clients and key internal and external stakeholders (MQ ME-S6: Exceeds). Lisa is a certified Project Management Professional (PMP) by the Project Management Institute (PMI) (MQ ME-S7: Meets).</p>		
Relevant Experience (Add additional tables as needed)			
Project Title	California Statewide Automated Welfare System (CalSAWS)		
Position Title	Solution Delivery Manager		
Begin Date	10/2021	End Date	Ongoing
Scope and Description of Responsibility	<p>Scope: Lisa manages the application development and testing for the core CalSAWS application, which includes detailed design, coding, review, testing, maintenance, and application performance-tuning. She supports users through application testing, acceptance, and deployment, and she manages the technical documentation process that captures application enhancements. Lisa is responsible for providing day-to-day management of Accenture resources and activities, including overall performance and Agreement compliance.</p>		

M&E PROJECT MANAGER				
	<p>Responsibility: Lisa manages CalSAWS' Application Development, Design, and Test teams of 299 people located onshore and offshore who analyze, design, develop, test, and debug custom/customized reports, interfaces, conversions, and extensions within the CalSAWS applications. She oversees her team's adherence to established development standards, methodologies, and change/version control. Lisa actively engages with State and County executives to provide updates on upcoming system changes, pending policies and enhancements, and general system status.</p>			
Skills Utilized and Experience Attained	<p>Skills Utilized: Lisa uses her skills to design and implement quality assurance measures, including testing. She is proactive and collaborative in her work with team leads and other stakeholders.</p> <p>Experience Attained: Lisa applies her knowledge of technologies, applications, methodologies, processes, and tools to support CalSAWS software configurations. She maintains application versions and verifies they meet client requirements and are deployed on time and within budget. Lisa conducts application project and issue management actions, including status, issue, and budget reporting. She makes decisions that impact the team via regular consultation with client and Accenture management and leadership teams.</p>			
Project Title	Consortium IV (C-IV)			
Position Title	C-IV Project Manager			
Begin Date	09/2016	End Date	09/2021	# of Months 61
Scope and Description of Responsibility	<p>Scope: Lisa was the primary interface with the executive director and the Consortium management team. She balanced quality, effort, resources, schedule, budget, and risk as part of the overall project scope. She managed Accenture resources and activities, including overall performance and Agreement compliance.</p> <p>Responsibility: Lisa was responsible for the execution and overall management of the contract and the Accenture team. She engaged with the Consortium management team on a day-to-day basis to confirm the project received required Consortium commitment and support. She proactively collaborated with other CalSAWS contractors. Lisa possessed signature authority to commit Accenture to CalSAWS contracts, amendments and change notices. She reported on project progress, risks, and issues on an ongoing basis.</p>			
Skills Utilized and Experience Attained	<p>Skills Utilized: Lisa's organizational skills were evident as she planned, controlled, and reported on the ongoing and completed work. Her project management approach involves working as a single unit—all project members, regardless of agency or company—with a clear understanding of assignments, the schedule for each task, and expected outcomes. By paying careful attention to the individual efforts of each team member and then integrating them into the overall project effort, she delivered quality within the project. She supported effective communication among the project management team. She confirmed there were no communication silos and exhibited Accenture's open communication and open-door policies.</p> <p>Experience Attained: Lisa worked cooperatively with the Consortium's project director and management staff to identify, track, and resolve problems and issues. She managed the C-IV project in a proactive manner that kept the project team on schedule and stakeholders informed throughout delivery of the C-IV system. Under her</p>			

M&E PROJECT MANAGER				
	leadership, the Accenture team delivered over 500,000 hours of system changes on time and within budget. This included key policy changes to keep the C-IV system current to policy. Additionally, Accenture planned and managed with the Consortium the 10 weeks of side-by-side system functionality sessions with the 40 counties. Over 200 county participants reviewed the C-IV and LRS systems and documented more than 300 CalACES requirements. This was the foundational effort on the Consortium's journey to CalSAWS.			
Project Title	Consortium IV (C-IV)			
Position Title	Application Development and Test Lead			
Begin Date	08/2010	End Date	08/2016	#of Months 73
Scope and Description of Responsibility	<p>Scope: Lisa managed the application development and installation projects, including design, coding, review, testing, maintenance, and application performance-tuning. She supported users via application acceptance and deployment, and she managed the technical documentation process to capture application enhancements.</p> <p>Responsibility: Lisa managed C-IV Application Development and Test teams of 106 people (onshore and offshore) who analyzed, designed, developed, tested, and debugged custom/customized reports, interfaces, conversions, and extensions within the C-IV applications. She oversaw her team's adherence to established development standards, methodologies, and change/version control. Lisa created detailed technical and unit testing documentation, and collaborated with teams to troubleshoot and resolve application-related issues.</p>			
Skills Utilized and Experience Attained	<p>Skills Utilized: Lisa has master-level skills in application architecture, automation in application development, and configuration and release management. Her knowledge of core programming and coding principles, critical thinking and analytical skills, attention to detail, and project management skills created a solid platform for her when she took on the role of C-IV application development lead.</p> <p>Experience Attained: Lisa managed the application development project execution to adhere to requirements, schedule, and budget. She developed or updated project plans, including objectives, technologies, systems, information specifications, schedules, funding, and staffing, and she maintained the applications according to service level agreements.</p>			
Education (add rows as needed)				
Years	Course of Study	School		
02/1992–11/1995	B.Com., B.A. Japanese	The University of Queensland		
Professional Certifications or Designations (add rows as needed)				
Certification or Designation	Organization	Dates		
Project Management Professional (PMP)	Project Management Institute (PMI)	September 6, 2022–September 6, 2025. Certificate: 3308399 Lisa will maintain this certification for the life of the contract.		

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification ME-\$3	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: CalSAWS Consortium	Contact Name: [REDACTED]
Project Name: CalSAWS	Company Name: [REDACTED]
Time Period: October 1, 2021 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Solution Delivery Manager	
Description of relevant experience:	
<p>The CalSAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> Integrates with at least two applications, one of which is a COTS: The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal). Interfaces with at least five external systems, at least one of which is real-time: The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKS Appraisal Tool (OCAT), and Statewide Client Index all interface in real time. Is accessed by at least 1,000 users at multiple locations: The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500. Has a contract value of at least \$10,000,000 dollars: The CalSAWS contract value is \$1,425,495,842. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets. <p>As the Solution Delivery Manager, Lisa's responsibilities include:</p> <p>Project Scope</p> <ul style="list-style-type: none"> Serves as the Solution Delivery Manager supervising 299 resources across Application Development, Design and Release Management Teams on CalSAWS, a large and complex IT system in a health and human services project that is in production 	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- **Delivered high quality CalsAWS production bi-monthly releases while supporting the migration county cutovers and LA go-live on BenefitsCal**
- **Focused on expedited implementation of forms translations via Release When Ready (RWR), delivering over 120 form updates and translation**
- **Planned and executed the largest COLAs in CalsAWS for the CF COLA/CW Map Increase (40 counties) and SSA COLA (42 counties)**
- **Collaborated with Consortium and DHCS to develop an overview of the PHE unwinding and relationship with Migration waves and upcoming COLAs**
- **Facilitates conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones.**
- **Cooperates with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalsAWS enhancements, quality management, critical path tasks, and other issue that requires executive management attention**
- **Manages and oversees employee engagement activities to foster a working culture and workplace where Accenture's best resources can thrive**
- **Contributes to high average CalsAWS/SAWS tenure of Accenture resources (6.1 years) and Accenture Team Leads and above (8.9 years)**
- **Regularly represents the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"**

Communication and Collaboration

- **Conveys relevant progress/service status information and builds credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee**
- **Engages with the Section Directors on a daily basis to confirm the Project receives required Consortium commitment and support**
- **Proactively collaborates and coordinates with other Consortium CalsAWS contractors (BenefitsCal, Gainwell) at the weekly Leadership Alignment Meeting**
- **Builds and maintains strong working relationships with client and key internal (Section Directors, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS)**
- **Possesses strong and practical project management knowledge**
- **Uses PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication**

Reporting

- **Prepares special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports**
- **Communicates and reports on project progress, risks, and issues on an ongoing basis at Monthly CalsAWS IT Report meeting with OSI, CMS, FNS.**

Project #2	Contact #2
Company Name: CalsAWS Consortium	Contact Name: [REDACTED]
Project Name: C-IV	Company Name: [REDACTED]

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Time Period: September 1, 2016 – September 30, 2021	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: C-IV Project Manager	
Description of relevant experience:	
<p>The C-IV project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> Integrates with at least two applications, one of which is a COTS: The C-IV System integrated custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Adobe LiveCycle, Perceptive ImageNow, AWS Connect, and IBM Operational Decision Manager). Additionally, the core eligibility application interfaced with other custom applications (e.g., OCAT, Child Care Portal, and C4Yourself). Interfaces with at least five external systems, at least one of which is real-time: C-IV was the largest integrated eligibility system in the United States. The system had more than 50 batch and real-time interfaces with external systems including the Statewide Client Index, EBT Host-to-Host, and CalHEERS. Is accessed by at least 1,000 users at multiple locations: As of year-end 2021 (end of contract), C-IV was used by 39 California counties and served approximately 30% of California's public assistance caseload (approximately 4.8 million Californians). The C-IV System supported over 18,000 internal system users across more than 250 public assistance offices. Has a contract value of at least \$10,000,000 dollars: The C-IV contract value was \$1,879,699,002. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The C-IV system included a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (web browsers, tablets, kiosks), an application tier, and a data tier. <p>As the C-IV Project Manager Lisa's responsibilities included:</p> <p>Project Scope</p> <ul style="list-style-type: none"> Served as the C-IV Project Manager overseeing and supervising 240 resources across all Accenture teams for C-IV a large and complex IT system in a health and human services project Oversaw six, high quality, baseline releases each year and priority releases for the C-IV System (since 2016). Under her leadership, the Accenture team delivered over 500,000 hours of system changes on time and within budget. Oversaw the timely implementation of SSI cash-out, an extremely complex and critical policy change involving multiple Application Development, Release Management, Tech, Quality Assurance and Consortium teams. Collaborated with Consortium and County executives on CalACES migration planning, including the co-facilitation of the 10 week side-by-side planning sessions with representatives from the 40 counties. Over 200 county participants reviewed the C-IV and LRS systems and documented more than 300 CalACES requirements. This was the foundational effort on the Consortium's journey to CalSAWS. Provided day-to-day management of personnel and activities, including overall performance and Agreement compliance 	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Confirmed technical and support personnel possessed the appropriate skills and experience necessary to fulfill the responsibilities of the Agreement and were available throughout the life of the Agreement
- Responsible for the execution and overall management of the contract and Accenture team
- Managed and monitored Accenture's compliance with contractual obligations
- Possessed signature authority to commit Accenture to C-IV Contracts, Amendments, and Change Notices with the Consortium
- Oversaw the fulfillment of all requirements, including KPIs and C-IV SLAs
- Scheduled periodic performance reviews to help detect and correct deficiencies
- Cooperated with the Consortium PMO to resolve escalated issues related to contractual requirements, risk mitigation, enhancements, quality management, critical path tasks, and any others
- Demonstrated strong and practical project management knowledge
- Used PMBOK practices and was directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication
- Regularly represented the best interests of the Consortium at monthly meetings with PSC, JPA, and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

Time

- Developed the integrated master schedule at C-IV, determining project dependencies across project streams
- Created project schedules for each C-IV-approved project
- Managed project schedule to make sure that projects completed on time
- Defined and executed activities within each project schedule
- Estimated the duration of each activity and resources required to complete the project on time and on budget

Cost

- Estimated the total costs of projects requested by the Consortium
- Planned the budget for each C-IV -requested project
- Monitored the budget throughout the project to avoid overrun

Human Resources

- Evaluated staff to ensure skillsets met requested requirements
- Developed necessary technical trainings for the staff based on C-IV requirements

Risks

- Oversaw the risk management process across all projects to minimize risk to the business
- Proactively mitigated potential issues

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Prepared special reports and presentations related to the Project including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports

Quality

- Executed quality management processes to ensure deliverables met or exceeded C-IV standards
- Applied consistent CMMI Level 4 practices to drive higher-quality deliverables, less rework, reduced risks, and reduced costs

Integration

- Executed project integration management by coordinating all elements of the project including tasks, resources, stakeholders, and any other project elements
- Managed conflicts between different aspects of the project such as competing requests and necessary tradeoffs
- Worked with stakeholders and led annual strategic planning initiative focused on technology improvements and innovations
- Collaborated with other contractors on project-related activities

Communication

- Maintained communications plan
- Conveyed relevant information to an executive-level audience, confirming client was aware of progress/service status
- Built and maintained strong working relationships with client and key internal and external stakeholders confirming client is aware of progress/service status and builds credibility, fostering business-partnering relationships
- Engaged with the Consortium Management team daily to confirm the Project received required Consortium commitment and support
- Proactively collaborated and coordinated with other Consortium C-IV contractors
- Acted as a liaison with the Consortium Executive Director to confirm Consortium expectations were met
- Regularly communicated with Accenture's Technical Manager, Innovations Manager, Enterprise Architect, the Consortium Management team, and others as needed
- Provided executive level reporting and communications to Consortium Management, the Executive Director, JPA Board of Directors, Project Steering Committee, State program sponsors, and other stakeholders

Project #3	Contact #3
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]
Project Name: C-IV	Company Name: [REDACTED]
Time Period: August 1, 2010 – August 31, 2016	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Application Development and Test Lead	
Description of relevant experience:	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

The C-IV project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

1. **Integrates with at least two applications, one of which is a COTS:** The C-IV System integrated custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Adobe LiveCycle, Perceptive ImageNow, AWS Connect, and IBM Operational Decision Manager). Additionally, the core eligibility application interfaced with other custom applications (e.g., OCAT, Child Care Portal, and C4Yourself).
2. **Interfaces with at least five external systems, at least one of which is real-time:** C-IV was the largest integrated eligibility system in the United States. The system had more than 50 batch and real-time interfaces with external systems including the Statewide Client Index, EBT Host-to-Host, and CalHEERS.
3. **Is accessed by at least 1,000 users at multiple locations:** As of year-end 2021 (end of contract), C-IV was used by 39 California counties and served approximately 30% of California's public assistance caseload (approximately 4.8 million Californians). The C-IV System supported over 18,000 internal system users across more than 250 public assistance offices.
4. **Has a contract value of at least \$10,000,000 dollars:** The C-IV contract value was \$1,879,699,002.
5. **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The C-IV system included a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (web browsers, tablets, kiosks), an application tier, and a data tier.

As the Application Development and Test lead, Lisa's responsibilities included:

Project Scope

- Served as the Application Development and Test Lead supervising 106 resources across Application Development and Release Management Teams on CalSAWS, a large and complex IT system in a health and human services project that is in production
- Oversaw six high quality baseline releases and all priority releases from 2011-2016 from an Application Development and Release Management perspective
- Oversaw the planning and SDLC activities of the C-IV - CalHEERS interface, achieved in aggressive timeline while working with key Consortium and County stakeholders.
- Oversaw the implementation of county key strategic initiatives including electronic signature capability, text messages to clients, and reporting dashboards for county management and executives
- Facilitated conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones
- Cooperated with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalSAWS enhancements, quality management, critical path tasks, and any other issue that requires executive management attention
- Regularly represented the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE		
Communication and Collaboration <ul style="list-style-type: none"> Conveyed relevant progress/service status information and built credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee Engaged with the Consortium Management Team daily to confirm the Project receives required Consortium commitment and support Built and maintained strong working relationships with client and key internal (Consortium Management, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS) Possessed strong and practical project management knowledge Used PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication 		
Reporting <ul style="list-style-type: none"> Prepared special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports Communicated and reported on project progress, risks, and issues on an ongoing basis 		
Total Duration of all Projects cited to meet the MQ:		10 years
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: CalSAWS Consortium	Contact Name: [REDACTED]	
Project Name: C-IV	Company Name: [REDACTED]	
Time Period: September 1, 2016 – September 30, 2021	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: C-IV Project Manager		
Description of relevant experience:		
As the C-IV Project Manager Lisa's responsibilities included:		
Project Scope <ul style="list-style-type: none"> Served as the C-IV Project Manager overseeing and supervising 240 resources across all Accenture teams for C-IV a large and complex IT system in a health and human services project 		

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Oversaw six, high quality, baseline releases each year and priority releases since 2016 for the C-IV System. Under her leadership, the Accenture team delivered over 500,000 hours of system changes on time and within budget.
- Oversaw the on-time implementation of SSI cash-out, an extremely complex and critical policy change involving multiple Application Development, Release Management, Tech, Quality Assurance and Consortium teams.
- Collaborated with Consortium and Counties executives on the CalACES migration planning, including the co-facilitation of the 10 week side by side planning sessions with representatives from the 40 counties. Over 200 county participants reviewed the C-IV and LRS systems and documented more than 300 CalACES requirements. This was the foundational effort on the Consortium's journey to CalSAWS.
- Provided day-to-day management of personnel and activities, including overall performance and Agreement compliance
- Confirmed technical and support personnel possessed the appropriate skills and experience necessary to fulfill the responsibilities of the Agreement and were available throughout the life of the Agreement
- Managed execution of the contract and Accenture team
- Managed and monitored Accenture's compliance with contractual obligations
- Possessed signature authority to commit Accenture to C-IV Contracts, Amendments, and Change Notices with the Consortium
- Oversaw the fulfillment of all requirements, including KPIs and C-IV SLAs
- Scheduled periodic performance reviews to help detect and correct deficiencies
- Worked cooperatively with the Consortium PMO to resolve escalated issues including contractual requirements, risk mitigation, enhancements, quality management, critical path tasks, and any other issues
- Demonstrated strong and practical project management knowledge
- Used PMBOK practices and was directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication
- Regularly represented the best interests of the Consortium at monthly meetings with PSC, JPA, and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

Time

- Developed the integrated master schedule at C-IV, determining project dependencies across project streams
- Created project schedules for each C-IV -approved project
- Managed project schedule to make sure that projects completed on time
- Defined and executed the activities within each project schedule
- Estimated the duration of each activity and resources required to complete the project on time and on budget

Cost

- Estimated the total costs of projects requested by the Consortium
- Planned the budget for each C-IV -requested project

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Monitored the budget throughout the project to avoid overrun

Human Resources

- Evaluated the staff to make sure the skillset met the requested requirements
- Developed the necessary technical training for the staff based on C-IV requirements

Risks

- Oversaw the risk management process across all projects to minimize risk to the business
- Proactively mitigated potential issues
- Prepared special reports and presentations related to the Project including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports

Quality

- Executed the quality management processes to make sure deliverables met or exceeded C-IV standards
- Applied consistent CMMI Level 4 practices to confirm higher-quality deliverables, less rework, reduced risks, and reduced costs

Integration

- Executed project integration management by coordinating all elements of the project including tasks, resources, stakeholders, and any other project elements
- Managed conflicts between different aspects of the project such as competing requests and necessary tradeoffs
- Worked with stakeholders and led annual strategic planning initiative focused on technology improvements and innovations
- Collaborated with other contractors on project-related activities

Communication

- Maintained communications plan
- Conveyed relevant information to an executive-level audience, confirming client was aware of progress/service status
- Built and maintained strong working relationships with client and key internal and external stakeholders confirming client is aware of progress/service status and builds credibility, fostering business-partnering relationships
- Engaged with the Consortium Management team daily to confirm the Project received required Consortium commitment and support
- Proactively collaborated and coordinated with other Consortium C-IV contractors
- Acted as a liaison with the Consortium Executive Director to confirm Consortium expectations were met
- Regularly communicated with Accenture's Technical Manager, Innovations Manager, Enterprise Architect, the Consortium Management team, and others as needed
- Provided executive level reporting and communications to Consortium Management, the Executive Director, JPA Board of Directors, Project Steering Committee, State program sponsors, and other stakeholders

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE		
Total Duration of all Projects cited to meet the MQ:		5 years, 1 month
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.	
Project #1	Contact #1	
Company Name: CalsAWS Consortium	Contact Name: [REDACTED]	
Project Name: CalsAWS	Company Name: [REDACTED]	
Time Period: October 1, 2021 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: Solution Delivery Manager		
Description of relevant experience:		
<p>The CalsAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> Integrates with at least two applications, one of which is a COTS: The CalsAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal). Interfaces with at least five external systems, at least one of which is real-time: The CalsAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKs Appraisal Tool (OCAT), and Statewide Client Index all interface in real time. Is accessed by at least 1,000 users at multiple locations: The CalsAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalsAWS users will be approximately 41,500. Has a contract value of at least \$10,000,000 dollars: The CalsAWS contract value is \$1,425,495,842. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The CalsAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets. <p>As the Solution Delivery Manager, Lisa's responsibilities include:</p> <p>Project Scope</p> <ul style="list-style-type: none"> Serves as the Solution Delivery Manager supervising 299 resources across Application Development, Design and Release Management Teams on CalsAWS, a large and complex IT system in a health and human services project that is in production 		

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- **Delivered high quality CalsAWS production bi-monthly releases while supporting the migration county cutovers and LA go-live on BenefitsCal**
- **Focused on expedited implementation of forms translations via Release When Ready (RWR), delivering over 120 form updates and translation**
- **Planned and executed the largest COLAs in CalsAWS for the CF COLA/CW Map Increase (40 counties) and SSA COLA (42 counties)**
- **Collaborated with Consortium and DHCS to develop an overview of the PHE unwinding and relationship with Migration waves and upcoming COLAs**
- **Facilitates conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones.**
- **Cooperates with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalsAWS enhancements, quality management, critical path tasks, and other issue that requires executive management attention**
- **Manages and oversees employee engagement activities to foster a working culture and workplace where Accenture's best resources can thrive**
- **Contributes to high average CalsAWS/SAWS tenure of Accenture resources (6.1 years) and Accenture Team Leads and above (8.9 years)**
- **Regularly represents the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"**

Communication and Collaboration

- **Conveys relevant progress/service status information and builds credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee**
- **Engages with the Section Directors on a daily basis to confirm the Project receives required Consortium commitment and support**
- **Proactively collaborates and coordinates with other Consortium CalsAWS contractors (BenefitsCal, Gainwell) at the weekly Leadership Alignment Meeting**
- **Builds and maintains strong working relationships with client and key internal (Section Directors, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS)**
- **Possesses strong and practical project management knowledge**
- **Uses PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication**

Reporting

- **Prepares special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports**
- **Communicates and reports on project progress, risks, and issues on an ongoing basis at Monthly CalsAWS IT Report meeting with OSI, CMS, FNS**

Project #2	Contact #2
Company Name: CalsAWS Consortium	Contact Name: [REDACTED]
Project Name: C-IV	Company Name: [REDACTED]

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE		
Time Period: September 1, 2016 – September 30, 2021	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: C-IV Project Manager		
Description of relevant experience:		
<p>The C-IV project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> Integrates with at least two applications, one of which is a COTS: The C-IV System integrated custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Adobe LiveCycle, Perceptive ImageNow, AWS Connect, and IBM Operational Decision Manager). Additionally, the core eligibility application interfaced with other custom applications (e.g., OCAT, Child Care Portal, and C4Yourself). Interfaces with at least five external systems, at least one of which is real-time: C-IV was the largest integrated eligibility system in the United States. The system had more than 50 batch and real-time interfaces with external systems including the Statewide Client Index, EBT Host-to-Host, and CalHEERS. Is accessed by at least 1,000 users at multiple locations: As of year-end 2021 (end of contract), C-IV was used by 39 California counties and served approximately 30% of California's public assistance caseload (approximately 4.8 million Californians). The C-IV System supported over 18,000 internal system users across more than 250 public assistance offices. Has a contract value of at least \$10,000,000 dollars: The C-IV contract value was \$1,879,699,002. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The C-IV system included a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (web browsers, tablets, kiosks), an application tier, and a data tier. <p>As the C-IV Project Manager Lisa's responsibilities included:</p> <p>Project Scope</p> <ul style="list-style-type: none"> Served as the C-IV Project Manager overseeing and supervising 240 resources across all Accenture teams for C-IV a large and complex IT system in a health and human services project Oversaw six, high quality, baseline releases each year and priority releases for the C-IV System (since 2016). Under her leadership, the Accenture team delivered over 500,000 hours of system changes on time and within budget. Oversaw the timely implementation of SSI cash-out, an extremely complex and critical policy change involving multiple Application Development, Release Management, Tech, Quality Assurance and Consortium teams. Collaborated with Consortium and County executives on CalACES migration planning, including the co-facilitation of the 10 week side-by-side planning sessions with representatives from the 40 counties. Over 200 county participants reviewed the C-IV and LRS systems and documented more than 300 CalACES requirements. This was the foundational effort on the Consortium's journey to CalSAWS. Provided day-to-day management of personnel and activities, including overall performance and Agreement compliance 		

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Confirmed technical and support personnel possessed the appropriate skills and experience necessary to fulfill the responsibilities of the Agreement and were available throughout the life of the Agreement
- Responsible for the execution and overall management of the contract and Accenture team
- Managed and monitored Accenture's compliance with contractual obligations
- Possessed signature authority to commit Accenture to C-IV Contracts, Amendments, and Change Notices with the Consortium
- Oversaw the fulfillment of all requirements, including KPIs and C-IV SLAs
- Scheduled periodic performance reviews to help detect and correct deficiencies
- Cooperated with the Consortium PMO to resolve escalated issues related to contractual requirements, risk mitigation, enhancements, quality management, critical path tasks, and any others
- Demonstrated strong and practical project management knowledge
- Used PMBOK practices and was directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication
- Regularly represented the best interests of the Consortium at monthly meetings with PSC, JPA, and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

Time

- Developed the integrated master schedule at C-IV, determining project dependencies across project streams
- Created project schedules for each C-IV-approved project
- Managed project schedule to make sure that projects completed on time
- Defined and executed activities within each project schedule
- Estimated the duration of each activity and resources required to complete the project on time and on budget

Cost

- Estimated the total costs of projects requested by the Consortium
- Planned the budget for each C-IV -requested project
- Monitored the budget throughout the project to avoid overrun

Human Resources

- Evaluated staff to ensure skillsets met requested requirements
- Developed necessary technical trainings for the staff based on C-IV requirements

Risks

- Oversaw the risk management process across all projects to minimize risk to the business
- Proactively mitigated potential issues

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Prepared special reports and presentations related to the Project including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports

Quality

- Executed quality management processes to ensure deliverables met or exceeded C-IV standards
- Applied consistent CMMI Level 4 practices to drive higher-quality deliverables, less rework, reduced risks, and reduced costs

Integration

- Executed project integration management by coordinating all elements of the project including tasks, resources, stakeholders, and any other project elements
- Managed conflicts between different aspects of the project such as competing requests and necessary tradeoffs
- Worked with stakeholders and led annual strategic planning initiative focused on technology improvements and innovations
- Collaborated with other contractors on project-related activities

Communication

- Maintained communications plan
- Conveyed relevant information to an executive-level audience, confirming client was aware of progress/service status
- Built and maintained strong working relationships with client and key internal and external stakeholders confirming client is aware of progress/service status and builds credibility, fostering business-partnering relationships
- Engaged with the Consortium Management team daily to confirm the Project received required Consortium commitment and support
- Proactively collaborated and coordinated with other Consortium C-IV contractors
- Acted as a liaison with the Consortium Executive Director to confirm Consortium expectations were met
- Regularly communicated with Accenture's Technical Manager, Innovations Manager, Enterprise Architect, the Consortium Management team, and others as needed
- Provided executive level reporting and communications to Consortium Management, the Executive Director, JPA Board of Directors, Project Steering Committee, State program sponsors, and other stakeholders

Project #3	Contact #3
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]
Project Name: C-IV	Company Name: [REDACTED]
Time Period: August 1, 2010 – August 31, 2016	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Application Development and Test Lead	
Description of relevant experience:	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

The C-IV project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

1. **Integrates with at least two applications, one of which is a COTS:** The C-IV System integrated custom Java code with multiple COTS applications (e.g., Oracle database and middleware products, Adobe LiveCycle, Perceptive ImageNow, AWS Connect, and IBM Operational Decision Manager). Additionally, the core eligibility application interfaced with other custom applications (e.g., OCAT, Child Care Portal, and C4Yourself).
2. **Interfaces with at least five external systems, at least one of which is real-time:** C-IV was the largest integrated eligibility system in the United States. The system had more than 50 batch and real-time interfaces with external systems including the Statewide Client Index, EBT Host-to-Host, and CalHEERS.
3. **Is accessed by at least 1,000 users at multiple locations:** As of year-end 2021 (end of contract), C-IV was used by 39 California counties and served approximately 30% of California's public assistance caseload (approximately 4.8 million Californians). The C-IV System supported over 18,000 internal system users across more than 250 public assistance offices.
4. **Has a contract value of at least \$10,000,000 dollars:** The C-IV contract value was \$1,879,699,002.
5. **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The C-IV system included a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (web browsers, tablets, kiosks), an application tier, and a data tier.

As the Application Development and Test lead, Lisa's responsibilities included:

Project Scope

- Served as the Application Development and Test Lead supervising 106 resources across Application Development and Release Management Teams on CalSAWS, a large and complex IT system in a health and human services project that is in production
- Oversaw six high quality baseline releases and all priority releases from 2011-2016 from an Application Development and Release Management perspective
- Oversaw the planning and SDLC activities of the C-IV-CalHEERS interface, achieved in aggressive timeline while working with key Consortium and County stakeholders.
- Oversaw the implementation of county key strategic initiatives including electronic signature capability, text messages to clients, and reporting dashboards for county management and executives
- Facilitated conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones
- Cooperated with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalSAWS enhancements, quality management, critical path tasks, and any other issue that requires executive management attention
- Regularly represented the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE**Communication and Collaboration**

- Conveyed relevant progress/service status information and built credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee
- Engaged with the Consortium Management Team daily to confirm the Project receives required Consortium commitment and support
- Built and maintained strong working relationships with client and key internal (Consortium Management, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS)
- Possessed strong and practical project management knowledge
- Used PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication

Reporting

- Prepared special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports
- Communicated and reported on project progress, risks, and issues on an ongoing basis

Total Duration of all Projects cited to meet the MQ:**10 years**

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: CalSAWS Consortium

Contact Name: [REDACTED]

Project Name: CalSAWS

Company Name: [REDACTED]

Time Period: October 1, 2021 – January 4, 2023 (Ongoing)

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Solution Delivery Manager

Description of relevant experience:

As the Solution Delivery Manager, Lisa's responsibilities include:**Project Scope**

- Serves as the Solution Delivery Manager supervising 299 resources across Application Development, Design and Release Management Teams on CalSAWS, a large and complex IT system in a health and human services project that is in production
- Delivered high quality CalSAWS production bi-monthly releases while supporting the migration county cutovers and LA go-live on BenefitsCal

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Focused on expedited implementation of forms translations via Release When Ready (RWR), delivering over 120 form updates and translation
- Planned and executed the largest COLAs in CalSAWS for the CF COLA/CW Map Increase (40 counties) and SSA COLA (42 counties)
- Collaborated with Consortium and DHCS to develop an overview of the PHE unwinding and relationship with Migration waves and upcoming COLAs
- Facilitates conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones.
- Cooperates with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalSAWS enhancements, quality management, critical path tasks, and other issue that requires executive management attention
- Manages and oversees employee engagement activities to foster a working culture and workplace where Accenture's best resources can thrive
- Contributes to high average CalSAWS/SAWS tenure of Accenture resources (6.1 years) and Accenture Team Leads and above (8.9 years)
- Regularly represents the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

Communication and Collaboration

- Conveys relevant progress/service status information and builds credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee
- Engages with the Section Directors on a daily basis to confirm the Project receives required Consortium commitment and support
- Proactively collaborates and coordinates with other Consortium CalSAWS contractors (BenefitsCal, Gainwell) at the weekly Leadership Alignment Meeting
- Builds and maintains strong working relationships with client and key internal (Section Directors, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS)
- Possesses strong and practical project management knowledge
- Uses PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication

Reporting

- Prepares special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports
- Communicates and reports on project progress, risks, and issues on an ongoing basis at Monthly CalSAWS IT Report meeting with OSI, CMS, FNS

Project #2	Contact #2
Company Name: C-IV Consortium	Contact Name: [REDACTED]
Project Name: C-IV	Company Name: [REDACTED]
Time Period: September 1, 2016 – September 30, 2021	Phone Number: [REDACTED]

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE	
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: C-IV Project Manager	
Description of relevant experience:	
<p>As the C-IV Project Manager Lisa's responsibilities included:</p> <p>Project Scope</p> <ul style="list-style-type: none"> Served as the C-IV Project Manager overseeing and supervising 240 resources across all Accenture teams for C-IV a large and complex IT system in a health and human services project Oversaw six, high quality, baseline releases each year and priority releases for the C-IV System (since 2016). Under her leadership, the Accenture team delivered over 500,000 hours of system changes on time and within budget. Oversaw the timely implementation of SSI cash-out, an extremely complex and critical policy change involving multiple Application Development, Release Management, Tech, Quality Assurance and Consortium teams. Collaborated with Consortium and County executives on CalACES migration planning, including the co-facilitation of the 10 week side-by-side planning sessions with representatives from the 40 counties. Over 200 county participants reviewed the C-IV and LRS systems and documented more than 300 CalACES requirements. This was the foundational effort on the Consortium's journey to CalSAWS. Provided day-to-day management of personnel and activities, including overall performance and Agreement compliance Confirmed technical and support personnel possessed the appropriate skills and experience necessary to fulfill the responsibilities of the Agreement and were available throughout the life of the Agreement Responsible for the execution and overall management of the contract and Accenture team Managed and monitored Accenture's compliance with contractual obligations Possessed signature authority to commit Accenture to C-IV Contracts, Amendments, and Change Notices with the Consortium Oversaw the fulfillment of all requirements, including KPIs and C-IV SLAs Scheduled periodic performance reviews to help detect and correct deficiencies Cooperated with the Consortium PMO to resolve escalated issues related to contractual requirements, risk mitigation, enhancements, quality management, critical path tasks, and any others Demonstrated strong and practical project management knowledge Used PMBOK practices and was directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication Regularly represented the best interests of the Consortium at monthly meetings with PSC, JPA, and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right" 	

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE**Time**

- Developed the integrated master schedule at C-IV, determining project dependencies across project streams
- Created project schedules for each C-IV-approved project
- Managed project schedule to make sure that projects completed on time
- Defined and executed activities within each project schedule
- Estimated the duration of each activity and resources required to complete the project on time and on budget

Cost

- Estimated the total costs of projects requested by the Consortium
- Planned the budget for each C-IV -requested project
- Monitored the budget throughout the project to avoid overrun

Human Resources

- Evaluated staff to ensure skillsets met requested requirements
- Developed necessary technical trainings for the staff based on C-IV requirements

Risks

- Oversaw the risk management process across all projects to minimize risk to the business
- Proactively mitigated potential issues
- Prepared special reports and presentations related to the Project including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports

Quality

- Executed quality management processes to ensure deliverables met or exceeded C-IV standards
- Applied consistent CMMI Level 4 practices to drive higher-quality deliverables, less rework, reduced risks, and reduced costs

Integration

- Executed project integration management by coordinating all elements of the project including tasks, resources, stakeholders, and any other project elements
- Managed conflicts between different aspects of the project such as competing requests and necessary tradeoffs
- Worked with stakeholders and led annual strategic planning initiative focused on technology improvements and innovations
- Collaborated with other contractors on project-related activities

Communication

- Maintained communications plan

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Conveyed relevant information to an executive-level audience, confirming client was aware of progress/service status
- Built and maintained strong working relationships with client and key internal and external stakeholders confirming client is aware of progress/service status and builds credibility, fostering business-partnering relationships
- Engaged with the Consortium Management team daily to confirm the Project received required Consortium commitment and support
- Proactively collaborated and coordinated with other Consortium C-IV contractors
- Acted as a liaison with the Consortium Executive Director to confirm Consortium expectations were met
- Regularly communicated with Accenture's Technical Manager, Innovations Manager, Enterprise Architect, the Consortium Management team, and others as needed
- Provided executive level reporting and communications to Consortium Management, the Executive Director, JPA Board of Directors, Project Steering Committee, State program sponsors, and other stakeholders

Project #3**Contact #3**

Company Name: C-IV Consortium

Contact Name: [REDACTED]

Project Name: C-IV

Company Name: [REDACTED]

Time Period: August 1, 2010 – August 31, 2016

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Application Development and Test Lead

Description of relevant experience:

As the Application Development and Test lead, Lisa's responsibilities included:**Project Scope**

- Served as the Application Development and Test Lead supervising 106 resources across Application Development and Release Management Teams on CalsAWS, a large and complex IT system in a health and human services project that is in production
- Oversaw six high quality baseline releases and all priority releases from 2011-2016 from an Application Development and Release Management perspective
- Oversaw the planning and SDLC activities of the C-IV-CalHEERS interface, achieved in aggressive timeline while working with key Consortium and County stakeholders.
- Oversaw the implementation of county key strategic initiatives including electronic signature capability, text messages to clients, and reporting dashboards for county management and executives
- Facilitated conversations with the Infrastructure Operations teams to ensure alignment on project deliverables, upcoming releases, and project milestones

PART 2 – M&E PROJECT MANAGER MINIMUM QUALIFICATIONS TABLE

- Cooperated with the Consortium project management office (PMO) to resolve escalated issues including risk mitigation, CalSAWS enhancements, quality management, critical path tasks, and any other issue that requires executive management attention
- Regularly represented the best interests of the Consortium at monthly meetings with PSC & JPA and daily stand ups with Consortium Section Directors by instilling a culture of transparency and "doing what's right"

Communication and Collaboration

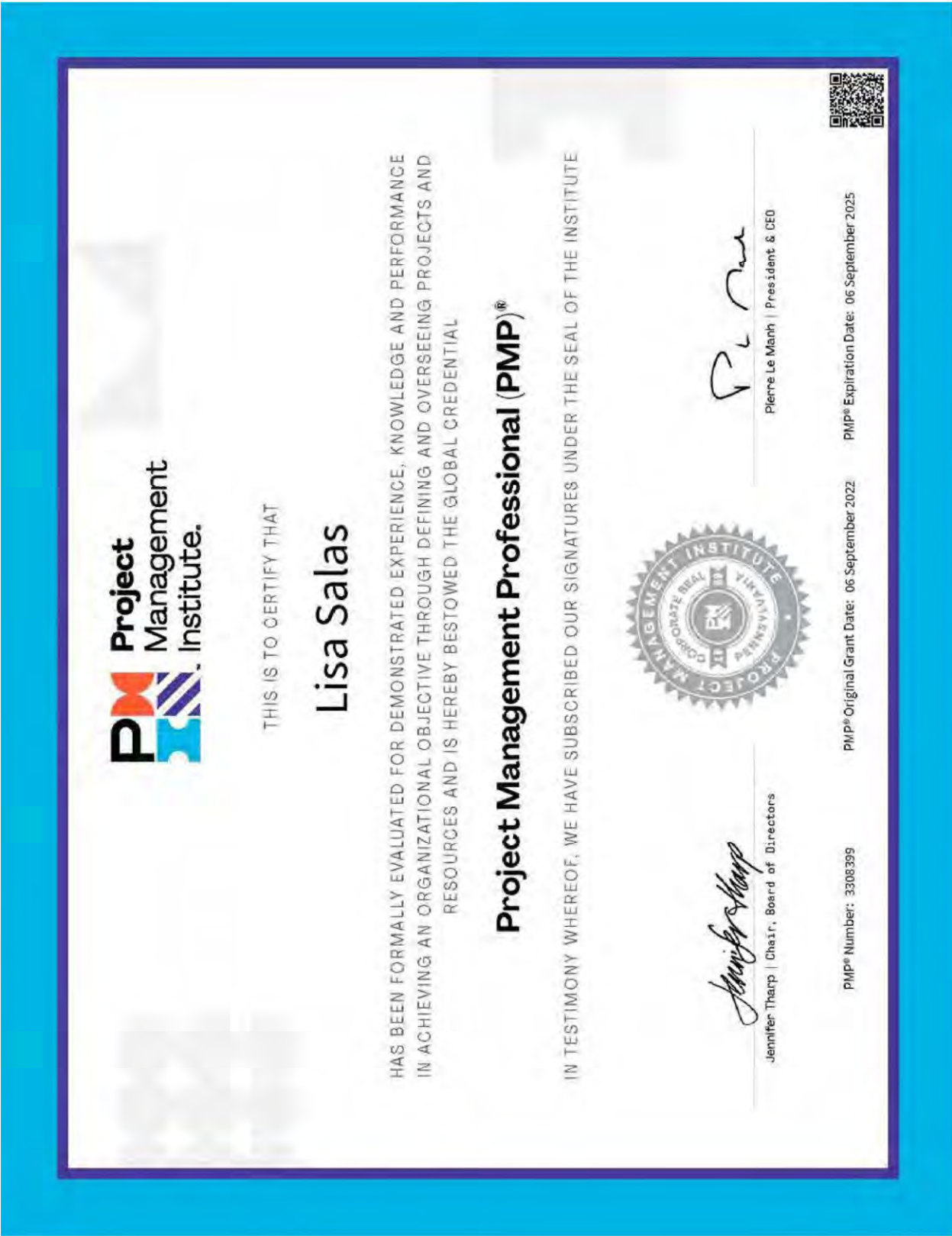
- Conveyed relevant progress/service status information and built credibility with an executive-level audience including Executive Director, Section Directors, Joint Powers Authority (SPA) Board, Project Steering Committee (PSC), Welfare Client Data Systems (WCDS) subcommittee
- Engaged with the Consortium Management Team daily to confirm the Project receives required Consortium commitment and support
- Built and maintained strong working relationships with client and key internal (Consortium Management, JPA, PSC) and external stakeholders (OSI, CDSS, DHCS)
- Possessed strong and practical project management knowledge
- Used PMBOK practices and is directly responsible for activities in the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication

Reporting

- Prepared special reports and presentations related to the project, including ongoing status and metrics, issue and resolution, risk, and all necessary ad hoc reports
- Communicated and reported on project progress, risks, and issues on an ongoing basis

Total Duration of all Projects cited to meet the MQ:		10 years
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Minimum Qualification ME-S7	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
Project Management Professional (PMP)	3308399	September 6, 2022	September 6, 2025
			Online Validation Link: if not available, attach a copy to the offer https://www.pmi.org/certifications/certification-resources/register



1.2 M&E PROJECT MANAGEMENT OFFICE LEAD STAFF QUALIFICATIONS

M&E PROJECT MANAGEMENT OFFICE (PMO) LEAD			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	Lulu Fou		
Position in the Company	Managing Director	Length of Time in Position	22 years
Project Position & Responsibilities	M&E Project Management Office (PMO) Lead Project responsibilities will be as defined in RFP section 13.1.3.6.2		
Skills & Qualifications for Project Position	<p>Skills: Lulu has expert management skills in all nine Project Management Body of Knowledge (PMBOK) elements: integration, scope, time, cost, quality, people, communication, risk, and procurement. She has strong leadership and problem-solving skills. She is proactive and agile, adapts to change easily, and sees the big picture, yet is detail oriented. She has expert-level skills in relevant project management software applications and tools, including the Microsoft Office suite (Timeline and Project), ServiceNow, and Jira.</p> <p>Qualifications: Lulu has 32 years of extensive experience in project and program management, including 19 years as the PMO lead for Consortium organizations: CalSAWS, LRS, CalPERS, and C-IV. (MQ ME-S8: Exceeds). For three years and 10 months, Lulu has managed a blended onsite and remote PMO team during the planning, execution, and evaluation of all IT project activities, and she is responsible for all project management knowledge areas: scope, time, cost, human resource, risk, quality, integration, and communication on CalSAWS. (MQ ME-S9: Exceeds). Lulu is a Project Management Professional (PMP) certified by the Project Management Institute (PMI). (MQ ME-S10: Meets).</p>		
Relevant Experience (Add additional tables as needed)			
Project Title	California State Automated Welfare System (CalSAWS)		
Position Title	Program/Project Management Office Lead		
Begin Date	03/2019	End Date	Ongoing
			# of Months
Scope and Description of Responsibility	46		
<p>Scope: Lulu's scope includes overseeing the project management activities for M&O, M&E, and DD&I Migration of the 39 C-IV counties and 18 CalWIN counties to CalSAWS. This scope includes managing the development and maintenance of workplans, project timeline, resource assignments, contract compliance and changes, and management of a 900-person project team located in five countries.</p> <p>Responsibility: Lulu maintains oversight for all program functions including managing and supervising the project management office (PMO). She confirms proper tracking and updating of requirements from initiation and development through the implementation phase. She monitors and evaluates business management activities following PMBOK project management guidelines to confirm complete, accurate, and timely auditing. She</p>			

M&E PROJECT MANAGEMENT OFFICE (PMO) LEAD				
	collaborates with delivery managers to confirm project oversight of all PMO and organizational change management processes and procedures.			
Skills Utilized and Experience Attained	<p>Skills: Lulu uses SharePoint and Microsoft Office apps to manage contracts, deliverables, resources, and schedules, and to perform quality assurance, risk and issue management, and reporting. She is skilled in ServiceNow, Pingboard, Office Timeline, Zoom, and Teams.</p> <p>Experience: Lulu provides PMO leadership over the Deliverable Management Process and the creation and maintenance of the CalSAWS Project Control Document (PCD), M&O Services Plan, and M&E services deliverables. She leads the Work Plan team and manages more than 245 work plans and the CalSAWS DD&I critical path. In response to the COVID-19 pandemic, Lulu developed and rolled out training for project personnel using Microsoft Teams to transition over 800 personnel from the Rancho Cordova and Norwalk project offices to a remote work model in two weeks.</p>			
Project Title	LEADER Replacement System (LRS)			
Position Title	Project Management Office Manager			
Begin Date	11/2012	End Date	03/2019	# of Months
Scope and Description of Responsibility	<p>Scope: Lulu managed all projects in the LRS delivery landscape, including managing milestones and dependencies across multiple stakeholders in this large and complex IT system, confirming clear accountabilities and shared understanding of outcomes and impacts, along with timely delivery of quality project deliverables and all work effort.</p> <p>Responsibility: Lulu was responsible for the project management of the DD&I phase, data center hosting and operations, central print and mail fulfillment operations, maintenance and operations (M&O), modifications and enhancements (M&E), and project facility management and operations.</p>			
Skills Utilized and Experience Attained	<p>Skills: Lulu used SharePoint and the Microsoft Office suite to manage contracts, deliverables, resources, and schedules, and to perform quality assurance, risk and issue management, and reporting. She managed the project plan, dependencies, and budget. She confirmed all solution elements were developed and deployed following quality standards.</p> <p>Experience: Lulu managed 75 DD&I deliverables with 100-percent on time submission and 100-percent approval rating. She led 30 personnel in the Project Management Office (PMO), managed the Norwalk project office buildout (60,000 square feet in 60 days), and managed the Norwalk project office's facilities team that supported over to support 525 personnel.</p>			
Project Title	California Public Employees' Retirement System (CalPERS)			
Position Title	Program/Project Management Office Lead			
Begin Date	06/2006	End Date	12/2010	# of Months
				55

M&E PROJECT MANAGEMENT OFFICE (PMO) LEAD			
Scope and Description of Responsibility	Scope: Lulu managed a \$200 million contract that included developing the PMO infrastructure and operational processes that led to the management of subcontracts, finances, quality, risk, schedule, resources, the change control process, and deliverable processes. Responsibility: Lulu managed the design, development, implementation, testing, maintaining, and converting data from three primary legacy and 11 secondary systems.		
Skills Utilized and Experience Attained	Skills: Lulu used Primavera to manage the project schedule and work plans. She used SharePoint and the Microsoft Office suite to manage contracts, deliverables, resources, and schedules, and to perform quality assurance, risk and issue management, and reporting. Lulu managed the project plan, dependencies, and budget. She confirmed all solution elements were developed and deployed following quality standards.		
Project Title	C-IV Consortium		
Position Title	Program/Project Management Office Lead		
Begin Date	03/2001	End Date	05/2006
			# of Months
			63
Scope and Description of Responsibility	Scope: Lulu managed a \$453 million contract for 250 personnel in tandem with the technical program management and implementation of the C-IV system, a large and complex IT system, across four counties to 250 offices, and 7,000 users. She was the Reports Design Confirmation Lead that led to C-IV Final Acceptance. Responsibility: Lulu's responsibilities included contract and financial management, subcontractor management of five vendors, procurement, and office and facility management.		
Skills Utilized and Experience Attained	Skills: Lulu was responsible for the project management of the design, development, testing, infrastructure build, user training, implementation, and maintenance services for the C-IV system, including preparation and execution of Release 1 Pilot, Release 2 Pilot, Release 1 Consortium-wide implementation, and Release 2 Consortium-wide rollout. Experience: Lulu managed Reports Design Confirmation and the UAT project for a team of 15 Accenture personnel and 60 users. She completed the redesign and confirmation of 128 federal and State reports.		
Education (add rows as needed)			
Years	Course of Study	School	
09/1985 – 06/1990	Computer Information Systems	California State Polytechnic University-Pomona	
Professional Certifications or Designations (add rows as needed)			
Certification or Designation	Organization	Dates	
Project Management Professional	Project Management Institute (PMI)	August 6, 2010 – August 6, 2025, Certificate: 1351707	

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification ME-\$8	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
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]
Project Name: CalSAWS	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) March 4, 2019 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Program/Project Management Office Lead	
Description of relevant experience:	
<p>The CalSAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> Integrates with at least two applications, one of which is a COTS: The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal). Interfaces with at least five external systems, at least one of which is real-time: The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKs Appraisal Tool (OCAT), and Statewide Client Index all interface in real time. Is accessed by at least 1,000 users at multiple locations: The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500. Has a contract value of at least \$10,000,000 dollars: The CalSAWS contract value is \$1,425,495,842. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets. 	
<p>As the CalSAWS Program/Project Management Office Lead, Lulu's responsibilities include:</p> <p>Project scope</p> <ul style="list-style-type: none"> Serves as the Program/Project Management Office Lead for Accenture, the System Integrator 	

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

- Works closely with the Delivery Managers and provides PMO oversight and support in the execution of Accenture's prime contract responsibilities
- Provides overall project management for Accenture M&O, M&E, and CalsAWS DD&I Migration work efforts (e.g., CalsAWS Project Gantt chart and DD&I critical path, CalsAWS Work Plan, risk and issue management, quality management, communication management, contract management, etc.)
- Provides PMO support over the NIST 800-53 audits and implementation of controls in the CalsAWS PCD, M&O Services Plan, and M&E Services Plan deliverables
- Develops and manages annual updates to the CalsAWS PCD, which includes the project management plans for Communications Management, Contract Management, Deficiency Management, Deliverable Management, Quality Management, Risk and Issue Management, and Staff Management
- Manages the execution of project management and project processes and procedures contained within the CalsAWS PCD
- Manages the updates to the M&O Services Plan and M&E Services Plan deliverables and the deliverable management process for CalsAWS DD&I deliverables
- Manages requirements compliance and tracking
- Manages and monitors the Work Plans developed by the Delivery Leads and Project Scheduler
- Manages monthly compliance, monitoring, tracking, and reporting of the service level agreements (SLAs)
- Manages the execution and performance of the CalsAWS prime contract and 25 subcontractor agreements
- Managed the expansion of the facility space at the Rancho Cordova project site
- Automates processes, including the roll-on and roll-off process in ServiceNow

Time

- Leads a PMO Work Plan team that manages more than 245 work plans in Microsoft Office Professional (Cloud-based Plan 3, 2022 version) and 8,430,768 hours across all work plans dating from the beginning of the project to present

Cost

- Manages consolidated C-IV services that continue into the existing CalsAWS prime contract
- Manages the contract amendment and change notice processes
- Manages and coordinates with the Accenture leads on Accenture's project budget, monthly invoice projections, and IAPDU and ABQ (premise) updates processes
- Provides financial reporting regarding planned and actual monthly expenditures using contract price schedules

Human resources

- Leads and manages the Accenture PMO team consisting of 40 personnel located onshore and offshore

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
	<ul style="list-style-type: none"> • Transitions personnel when required, including 800 personnel from the Rancho Cordova and Norwalk project sites to remote work in two weeks • Reacts with agility to unexpected situations, such as the development and roll out of Microsoft Teams to 800 personnel at the start of the COVID-19 pandemic • Manages the Rancho Cordova and Norwalk facilities team • Manages the Inclusion, Diversity, Equity and Advancement (IDEA) program at CalsAWS for 1,500 personnel, including diversity awareness workshops, the CalsAWS Buddy Program, and CalsAWS Table Talks sessions • Manages the Cultural Transformation program for the entire CalsAWS team of 1,500 personnel, including the creation of the Power of 58 brand, the CalsAWS "One Team" brand, and one CalsAWS mission—a new, one-team identity for multiple project sites with different cultures • Implements virtual team engagement initiatives for inclusion of the remote workforce, such as a monthly CalsAWS Connect newsletter, a monthly virtual project-wide/all-staff meeting series with an average of 500 participants, and AAPI, Latinx, Black, LGBTQIA+ Pride employee resource groups
Risk	<ul style="list-style-type: none"> • Manages related issue resolution and risk mitigation strategies after developing and launching the program • Manages risk and issues for the enterprise CalsAWS program across all Consortium vendors
Quality	<ul style="list-style-type: none"> • Manages the quality assurance program and quality metrics to improve service delivery continuously • Manages the deliverable management process for quality submission in achieving 100-percent Consortium approval • Leads and supports the development and delivery of all M&E deliverables and work products, confirming they are the highest quality and are delivered in accordance with the approved M&E Work Plan
Integration	<ul style="list-style-type: none"> • Oversees the PMO in the administration, enhancement, and maintenance of the CalsAWS.org website which was designed, developed, and rolled out in two months • Managed the integration of project management activities across the Accenture teams • Managed 81 DD&I Deliverables with 100-percent on time submission and 100-percent approval rating
Communication	<ul style="list-style-type: none"> • Builds strong working relationships with key internal and external stakeholders • Provided leadership direction across the Accenture functional teams to gain approval of the CalACES Migration Final Acceptance deliverable for the C-IV Counties' migration to the CalsAWS System

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

- Coordinates the monthly IT Project Status Meetings across the Accenture teams and with the Office of Systems Integration (OSI), the United States Department of Agriculture Food and Nutrition Service (FNS), and Centers for Medicare and Medicaid Services (CMS)
- Provides Zoom host and technical support for the monthly CalSAWS Joint Powers Authority (JPA) board meetings and project steering committee meetings
- Provides PMO leadership oversight for the CMS Streamlined Modular Certification for the CalSAWS DD&I Project
- Prepares and facilitates the Consortium weekly Section Directors' meetings for the Consortium Executive Director
- Coordinates and prepares for the weekly CalSAWS project status agenda and status reports across all Consortium vendors, and serves as backup facilitator of the weekly status meetings
- Plans and coordinates logistics onsite and remotely for the annual CalSAWS conferences

Project #2	Contact #2
Company Name: LA County Department of Public Social Services (DPSS)	Contact Name: [REDACTED]
Project Name: LEADER Replacement System (LRS)	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) November 7, 2012 – March 3, 2019	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Project Management Office Manager	

Description of relevant experience:

The LRS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- 1. Integrates with at least two applications, one of which is a COTS:** The LRS solution integrated with a member self-service portal, IVR, EDMS (document imaging), call center application, mobile apps, and a real-time lobby check-in. LRS and ancillary services use 60+ off the shelf software components as part of the overall solution including Adobe, Cisco, IBM, Informatica, Oracle, Pitney Bowes, SAP, ServiceNow, and VMWare.
- 2. Interfaces with at least five external systems, at least one of which is real-time:** The LRS solution interface with several real time external systems including MEDS, IEVS, DMS/ELP, CalWIN, Department of Children and Family Services (DCSF), Child Support Department of Public Social Services (DPSS), and CalHEERS (near real time).
- 3. Is accessed by at least 1,000 users at multiple locations:** The LRS solution was accessed by 13,000 Los Angeles County users at 130 office locations.
- 4. Has a contract value of at least \$10,000,000 dollars:** The solution contract value was \$1,054,145,353 (initial term, amended).

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

5. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The LRS solution includes multi-tiered architecture including front-end applications optimized for a variety of user interface platforms.

Lulu was the Project Management Office Manager for LRS. As the Project Management Office Manager, her responsibilities included:

Project scope

- Served as the Project Management Office Manager, which was a large and complex IT system in a health and human services project
- Led and managed the PMO, consisting of a team of approximately 30 personnel
- Developed and maintained standards, templates, and project management processes
- Managed the build out of the Norwalk Project Office, consisting of 60,000 square feet in 60 days
- Managed two major subcontractors supporting the data center provider and print vendor
- Led and achieved final acceptance of the LRS system
- Created, implemented, and maintained the LRS Project Control Document (PCD), M&O Services Plan, and M&E Services Plan
- Managed the Norwalk Project Office facilities for 525 personnel
- Managed and executed the compliance of the LRS agreement and requirements
- Managed the contract amendment and change notices process

Time

- Managed the project schedule, meeting 100-percent on-time delivery

Cost

- Managed the budget and client billings to deliver the LRS agreement on budget
- Managed the execution and compliance of the LRS agreement total price at approximately \$630 million
- Managed the warranty process

Human resources

- Managed the compliance of subcontractor agreements for approximately 10 staff augmentation vendors

Risk

- Managed the risk and issue management processes

Quality

- Managed the quality assurance program, metrics, and continuous improvement initiatives

Integration

- Managed 75 DD&I deliverables with 100-percent on time submission and 100-percent approval rating

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE			
Communication			
<ul style="list-style-type: none">Managed project reporting and facilitated the weekly project status meetingsManaged the change control board process and facilitated the change control meetings			
Total Duration of all Projects cited to meet the MQ:		5 years	
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		
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]		
Project Name: CalSAWS	Company Name: [REDACTED]		
Time Period: (Month, Day, Year – Month, Day, Year) March 4, 2019 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]		
Percentage of Time: 100%	Email: [REDACTED]		
Staff Role: Program/Project Management Office Lead			
Description of relevant experience:			
<p>The CalSAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none">Integrates with at least two applications, one of which is a COTS: The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal).Interfaces with at least five external systems, at least one of which is real-time: The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKs Appraisal Tool (OCAT), and Statewide Client Index all interface in real time.Is accessed by at least 1,000 users at multiple locations: The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500.Has a contract value of at least \$10,000,000 dollars: The CalSAWS contract value is \$1,425,495,842.Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets.			

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

As the CalsAWS Program/Project Management Office Lead, Lulu's responsibilities include:

Project Scope

- Serves as the Program/Project Management Office Lead for Accenture, the System Integrator
- Works closely with the Delivery Managers and provides PMO oversight and support in the execution of Accenture's prime contract responsibilities
- Provides overall project management for Accenture M&O, M&E, and CalsAWS DD&I Migration work efforts (e.g., CalsAWS Project Gantt chart and DD&I critical path, CalsAWS Work Plan, risk and issue management, quality management, communication management, contract management, etc.)
- Provides PMO support over the NIST 800-53 audits and implementation of controls in the CalsAWS PCD, M&O Services Plan, and M&E Services Plan deliverables
- Develops and manages annual updates to the CalsAWS PCD, which includes the project management plans for Communications Management, Contract Management, Deficiency Management, Deliverable Management, Quality Management, Risk and Issue Management, and Staff Management
- Manages the execution of project management and project processes and procedures contained within the CalsAWS PCD
- Manages the updates to the M&O Services Plan and M&E Services Plan deliverables and the deliverable management process for CalsAWS DD&I deliverables
- Manages requirements compliance and tracking
- Manages and monitors the Work Plans developed by the Delivery Leads and Project Scheduler
- Manages monthly compliance, monitoring, tracking, and reporting of the service level agreements (SLAs)
- Manages the execution and performance of the CalsAWS prime contract and 25 subcontractor agreements
- Managed the expansion of the facility space at the Rancho Cordova project site
- Automates processes, including the roll-on and roll-off process in ServiceNow

Time

- Leads a PMO Work Plan team that manages 245 work plans in Microsoft Office Professional (Cloud-based Plan 3, 2022 version) and 8,430,768 hours across all work plans dating from the beginning of the project to present

Cost

- Manages consolidated C-IV services that continue into the existing CalsAWS prime contract
- Manages the contract amendment and change notice processes
- Manages and coordinates with the Accenture leads on Accenture's project budget, monthly invoice projections, and IAPDU and ABQ (premise) updates processes
- Provides financial reporting regarding planned and actual monthly expenditures using contract price schedules

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

Human resources

- Leads and manages the Accenture PMO team consisting of 40 personnel located onshore and offshore
- Transitions personnel when required, including 800 personnel from the Rancho Cordova and Norwalk project sites to remote work in two weeks
- Reacts with agility to unexpected situations, such as the development and roll out of Microsoft Teams to 800 personnel at the start of the COVID-19 pandemic
- Manages the Rancho Cordova and Norwalk facilities team
- Manages the Inclusion, Diversity, Equity and Advancement (IDEA) program at CalsAWS for 1,500 personnel, including diversity awareness workshops, the CalsAWS Buddy Program, and CalsAWS Table Talks sessions
- Manages the Cultural Transformation program for the entire CalsAWS team of 1,500 personnel, including the creation of the Power of 58 brand, the CalsAWS "One Team" brand, and one CalsAWS mission—a new, one-team identity for multiple project sites with different cultures
- Implements virtual team engagement initiatives for inclusion of the remote workforce, such as a monthly CalsAWS Connect newsletter, a monthly virtual project-wide/all-staff meeting series with an average of 500 participants, and AAPI, Latinx, Black, LGBTQIA+ Pride employee resource groups

Risk

- Manages related issue resolution and risk mitigation strategies after developing and launching the program
- Manages risk and issues for the enterprise CalsAWS program across all Consortium vendors

Quality

- Manages the quality assurance program and quality metrics to improve service delivery continuously
- Manages the deliverable management process for quality submission in achieving 100-percent Consortium approval
- Leads and supports the development and delivery of all M&E deliverables and work products, confirming they are the highest quality and are delivered in accordance with the approved M&E Work Plan

Integration

- Oversees the PMO in the administration, enhancement, and maintenance of the CalsAWS.org website which was designed, developed, and rolled out in just months
- Managed the integration of project management activities across the Accenture teams
- Managed 81 DD&I Deliverables with 100-percent on time submission and 100-percent approval rating

Communication

- Builds strong working relationships with key internal and external stakeholders

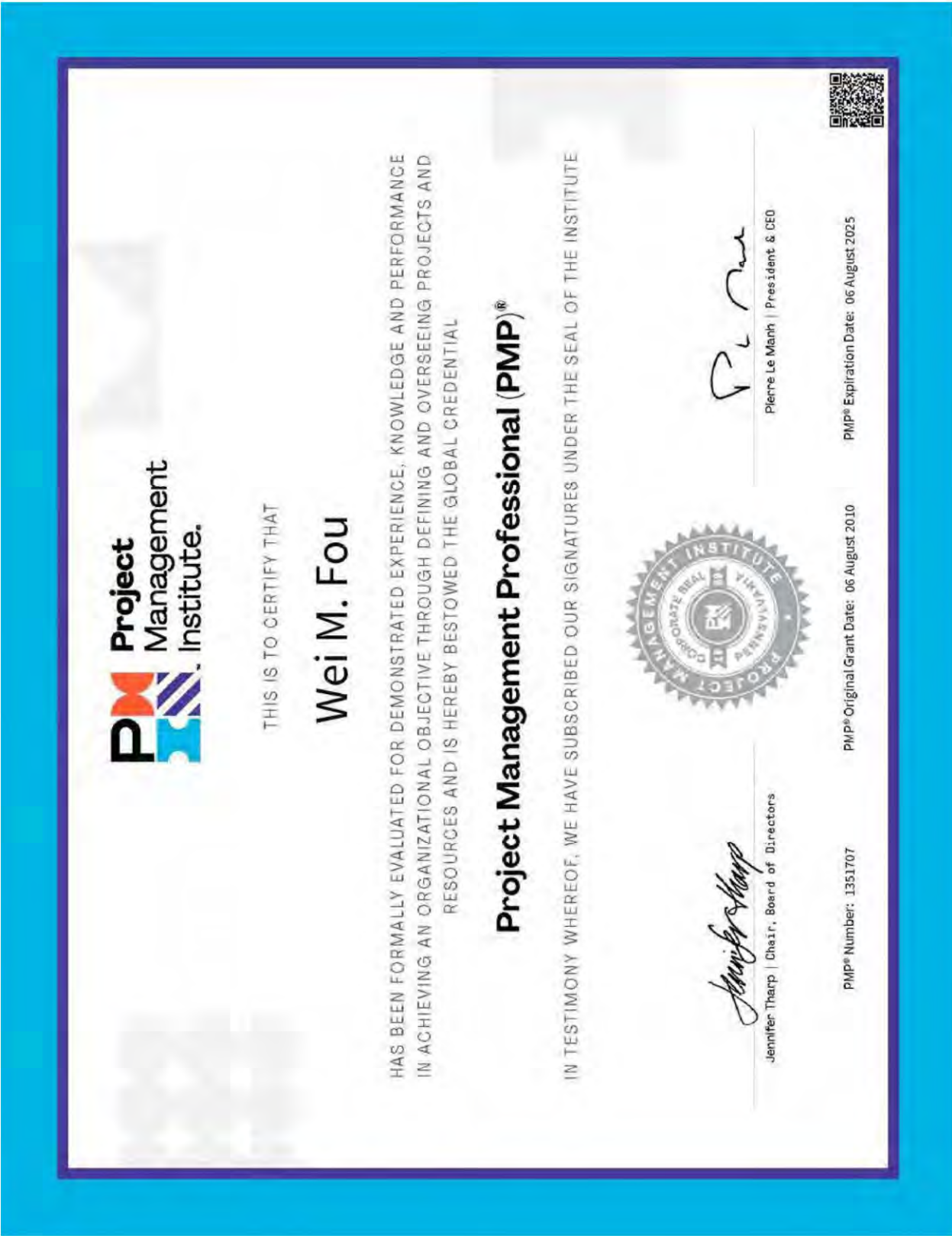
PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE

- Provided leadership direction across the Accenture teams to gain approval of the CalACES Migration Final Acceptance deliverable for the C-IV Counties' migration to the CalSAWS System
- Coordinates the monthly IT Project Status Meetings across the Accenture teams and with OSI, FNS, and CMS
- Provides Zoom host and technical support for the monthly CalSAWS JPA board meetings and project steering committee meetings
- Provides PMO leadership oversight for the CMS Streamlined Modular Certification for the CalSAWS DD&I Project
- Prepares and facilitates the Consortium weekly Section Directors' meetings for the Consortium Executive Director
- Coordinates and prepares for the weekly CalSAWS project status agenda and status reports across all Consortium vendors, and serves as backup facilitator of the weekly status meetings
- Plans and coordinates logistics onsite and remotely for the annual CalSAWS conferences

Project #2	Contact #2
Company Name: LA County Department of Public Social Services (DPSS)	Contact Name: [REDACTED]
Project Name: LEADER Replacement System (LRS)	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) November 7, 2012 – March 3, 2019	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Project Management Office Manager	
Description of relevant experience:	
<p>The LRS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:</p> <ol style="list-style-type: none"> 1. Integrates with at least two applications, one of which is a COTS: The LRS solution integrated with a member self-service portal, IVR, EDMS (document imaging), call center application, mobile apps, and a real-time lobby check-in. LRS and ancillary services use 60+ off the shelf software components as part of the overall solution including Adobe, Cisco, IBM, Informatica, Oracle, Pitney Bowes, SAP, ServiceNow, and VMWare. 2. Interfaces with at least five external systems, at least one of which is real-time: The LRS solution interface with several real time external systems including MEDS, IEVS, DMS/ELP, CalWIN, Department of Children and Family Services (DCSF), Child Support Department of Public Social Services (DPSS), and CalHEERS (near real time). 3. Is accessed by at least 1,000 users at multiple locations: The LRS solution was accessed by 13,000 Los Angeles County users at 130 office locations. 4. Has a contract value of at least \$10,000,000 dollars: The solution contract value was \$1,054,145.353 (initial term, amended). 	

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE	
5.	<p>Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The LRS solution includes multi-tiered architecture including front-end applications optimized for a variety of user interface platforms.</p> <p>Lulu was the Project Management Office Manager for LRS. As the Project Management Office Manager, her responsibilities included:</p> <p>Project scope</p> <ul style="list-style-type: none"> • Served as the Project Management Office Manager on LRS, which was a large and complex IT system in a health and human services project • Managed the scope management and requirements compliance processes • Managed the change control board process and facilitated the change control meetings • Managed and supported the Public Records Act requests • Developed the work plan with critical path and cross team dependencies • Maintained the LRS organization chart <p>Time</p> <ul style="list-style-type: none"> • Managed the project schedule, meeting 100-percent on time delivery <p>Cost</p> <ul style="list-style-type: none"> • Managed the fiscal budget, cost, and hardware and software procurement processes • Provided weekly reporting of budget, schedule variance, look ahead, and schedule performance index (SPI) metrics reporting <p>Human Resources</p> <ul style="list-style-type: none"> • Managed the roll-on, orientation, and roll-off process for all personnel • Managed the Accenture staff performance process • Implemented and managed the Accenture mentor program, recognition program, and retention program • Provided the monthly 24-month staffing plan <p>Risk</p> <ul style="list-style-type: none"> • Managed the monthly risk and issue management processes • Maintained the Risk Management Process in the PCD <p>Quality</p> <ul style="list-style-type: none"> • Managed the quality assurance program, quality metrics, and continuous improvement initiatives • Managed the deficiency management processes and low production defect backlog <p>Integration</p>

PART 2 – M&E PROJECT MANAGEMENT OFFICE LEAD MINIMUM QUALIFICATIONS TABLE		
<ul style="list-style-type: none"> Managed the integration of project management activities across the Accenture teams Managed 75 DD&I Deliverables with 100-percent on time submission and 100-percent approval rating 		
Communication		
<ul style="list-style-type: none"> Managed the LRS internal project communication processes Provided input and support to the LA County Department of Public Social Services (DPSS) monthly DPSS/STAT executive meetings Supported and coordinated the LRS monthly Steering Committee meetings 		
Total Duration of all Projects cited to meet the MQ:		10 years, 2 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
Project Management Professional (PMP)	1351707	August 6, 2010
		Expiration Date
		August 6, 2025
		Online Validation Link; if not available, attach a copy to the offer
		pmi.org/certifications/certification-resources/registry



1.3 M&E DELIVERY INTEGRATION MANAGER STAFF QUALIFICATIONS

M&E DELIVERY INTEGRATION MANAGER			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	James Gnesda		
Position in the Company	Technology Delivery Lead	Length of Time in Position	10 years
Project Position & Responsibilities	M&E Delivery Integration Manager James meets all of the requirements as defined in RFP section 13.1.3.6.3.		
Skills & Qualifications for Project Position	<p>Skills: James is skilled in M&E delivery integration and exceeds the mandatory requirements. His technical skills include application architecture, configuration and release management, design and build enablement, eligibility and enrollment, health data analytics, cloud strategy and assessment, data analytics, shareholder value analysis, and value analysis and prioritization. His project and program management skills include program project management, estimation and planning, scope management, Project Management Body of Knowledge (PMBOK), and communication.</p> <p>Qualifications: James has 20 years of experience leading and delivering complex technology initiatives in California. He has more than 10 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 (MQ ME-S11: Exceeds). James was the Application Development and Integration Lead for CalHEERS, a project similar in size and scale to CalSAWS (MQ ME-S12: Exceeds). For 10 years, James was assigned to CalHEERS then to CDPH Vaccine Management as a full-time equivalent (FTE). He used traditional and iterative solution delivery methodologies for both projects (MQ ME-S13: Exceeds). James has 9.5 years of experience building and maintaining strong working relationships with clients and key internal and external stakeholders; conveying relevant information to an executive-level audience, making sure clients and stakeholders are aware of progress/service status; and building credibility and fostering business-partnering relationships. He has demonstrated this capability on varied projects including State-based healthcare exchanges and integrated eligibility and vaccine management implementation and operations (MQ ME-S14: Exceeds).</p>		
Relevant Experience (Add additional tables as needed)			
Project Title	California Department of Public Health (CDPH) Vaccine Management		
Position Title	CDPH Client Account Lead		
Begin Date	12/2020	End Date	Ongoing
		# of Months	25

M&E DELIVERY INTEGRATION MANAGER			
Scope and Description of Responsibility	<p>Scope: As the Client Account Lead for the CDPH Vaccine Management Program, James develops and executes activities related to end-to-end project management, including project plans and estimates, scoping, and requirements through implementation and deployment. He also proactively monitors, manages, and reports on the execution of deliverables. With Accenture as the prime contractor, he leads the team that is developing and overseeing the project to support the statewide vaccination campaign. The Accenture-built and implemented Vaccine Management solution is a large-scale system integration. In delivering these solutions, his teams use the Agile Software Development Life Cycle (SDLC) approach to configure the systems, launch them in a matter of weeks, and deploy additional critical features every two weeks.</p> <p>Description of Responsibility: James is responsible for developing and executing activities related to end-to-end project management. He works across multiple teams and client stakeholders to align with project goals, schedules, and strategic initiatives. James leads Project team stand-up calls, weekly operations meetings, and monthly client steering committee meetings—managing issues and risk logs and escalations and reporting on overall project status to the client executive team.</p>		
Skills Utilized and Experience Attained	<p>Skills Utilized: In his role, James uses his strong leadership, planning, risk management, and communication skills for end-to-end project management. He uses his skills in application architecture, configuration and release management, design and build enablement, payer eligibility and enrollment, health data analytics, cloud strategy and assessment, data analytics, shareholder value analysis, and value analysis and prioritization to provide inputs to testing efforts and metrics.</p> <p>Experience Attained: James has attained and continues to attain experience in end-to-end project management and fostering business-partnering relationships through his work with CDPH Vaccine Management. He serves as a point of contact for CDPH Vaccine Management teams and has attained valuable experience in monitoring the effectiveness of team and contractor interactions with the best interests of the client in mind.</p>		
Project Title	California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)		
Position Title	Application Development and Integration Lead		
Begin Date	06/2012	End Date	04/2020
			# of Months
			95
Scope and Description of Responsibility	<p>Scope: James led the design and development of the Online Health Benefit Exchange for the State of California. This effort involved working with the COO, CTO, and the executive director of the Exchange regularly to determine key priorities and strategic drivers of maximizing consumer enrollment and retention. James drove key program and policy decisions with executive leadership at the California Health Benefit Exchange and regularly consulted with the Exchange on key business decisions on service center support, health plan offerings, and selection and enrollment processes. He also managed more than more than 100 employees for more than eight years with a 100,000-hour work plan through the SDLC, including requirements analysis of more</p>		

M&E DELIVERY INTEGRATION MANAGER			
	than 700 business and technical requirements and creating functional and detailed designs to satisfy those requirements. He managed multiple roles and interactions to make sure that teams worked collectively to achieve program goals.		
	Description of Responsibility: As the Application Development and Integration Lead, James was responsible for planning and managing the development team's work effort, managing the flow and quality of team deliverables while verifying that deadlines were met. James also identified changes in scope or work effort that would have resulted in changes to work plans, documenting, and communicating issues related to development activities and providing the Project Management team with weekly status updates. He conducted a large-scale system development management from start-up through maintenance and operations and was responsible for problem resolution with client senior executives and stakeholders.		
Skills Utilized and Experience Attained	Skills Utilized: In his role, James used his leadership, planning, risk management, and communication skills to lead the design and development of the Online Health Benefit Exchange. He used his leadership and interpersonal skills to work with executive leadership to determine key priorities and strategic drivers to maximize enrollment and retention. Experience Attained: James attained experience working with large-scale system development management from start-up through maintenance and operations and large-scale portal redesign through user-centered processes to achieve stakeholder buy-in and consumer-first results. He also gained further experience in senior executive client and stakeholder tactical and strategic relationship skills as well as problem resolution communication.		
Education (add rows as needed)			
Years	Course of Study	School	
09/1997–08/2001	B.S., Business Administration	California Polytechnic State University–San Luis Obispo	
Professional Certifications or Designations (add rows as needed)			
Certification or Designation	Organization	Dates	
Project Management Professional	Project Management Institute	August 21, 2018 – August 20, 2024; Certificate: 2239913 James will renew and maintain certification throughout the life of the contract.	

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: California Department of Public Health (CDPH)	Contact Name: [REDACTED]	
Project Name: CDPH Vaccine Management	Company Name: [REDACTED]	
Time Period: December 1, 2020 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: CDPH Client Account Lead (Equivalent to Delivery Integration Manager)		
Description of relevant experience:		
MQ 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.		
The CDPH Vaccine Management project meets the definition of a "large and complex IT system," based on the following criteria defined in the RFP:		
<div><div>1. Integrates with at least two applications, one of which is a COTS: The Vaccine Management solution integrates with MuleSoft, Salesforce AWS, and DocuSign, all of which are COTS platforms.</div><div>2. Interfaces with at least five external systems, at least one of which is real-time: Through MuleSoft, Salesforce, AWS, and DocuSign platforms, the Vaccine Management solution integrated with the CDPH, California Department of Technology (CDT), California Governor's Office of Emergency Services (CalOES), local health jurisdictions (LHJs), Centers for Disease Control and Prevention (CDC), U.S. Food and Drug Administration (FDA) through the Vaccine Adverse Event Reporting System (VAERS), California Department of Motor Vehicles (DMV), San Francisco Health Department, Los Angeles Health Department, educational institutions, clinics, and State and local government databases. The Vaccine Management solution used Accenture's Artificial Intelligence Plus (AIP+) platform of pre-integrated components—including a lake, warehouse, and processing tools for data along with advanced analytical tools and artificial intelligence—that were hosted on the cloud with Amazon Web Services (AWS). We used Salesforce Cloud to integrate public health and third-party data from various sources and feed it into the AIP+ platform in real time.</div><div>3. Is accessed by at least 1,000 users at multiple locations: The Vaccine Management portal was accessed by 16,000 COVID-19 vaccine providers and by more than two million residents.</div><div>4. Has a contract value of at least \$10,000,000 dollars: The total contract value was \$283,000,000.</div><div>5. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The Vaccine Management portal (for providers) included multi-tiered architecture including front-end applications optimized for various user interface platforms. The myCAVax end-to-end architecture includes a public web front-end portal with eight language translations, a</div></div>		

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

back-end data model with fuzzy match algorithms and immunization registry integration, a virtual assistant tool with process flows for the public to report issues, a security and integration tool to identify verification solution, and a staff remediation tool with AI-driven automation for data remediation.

As the CDPH Client Account Lead, James's responsibilities include:

Leadership and Program Scope Management

- **Manages and coordinates work across multidisciplinary teams across all workstreams for the Vaccine Management Program, which is comprised of 270 Accenture personnel (over 700 Accenture personnel at peak)**
- **Leads and coordinates the functional, analytics and reporting, service desk, integrations (MuleSoft, CalREDIE), security, marketing, program and project management, communications, technical and training teams to develop and implement the three vaccine management systems: myCAvax, My Turn, and Digital Vaccine Record (DVR). Each system is an integrated digital system and end-to-end user experience, including ongoing enhancements and agile-based feature releases**
- **Oversaw the design, development, test and implementation of the statewide vaccination system that supports the inoculation of 50,000 people daily at peak (and over 86M Californians to date) and the statewide clinic operations support to 9,000+ providers, Local Health Jurisdictions (LHJs), and counties**
- **Led the coordination of functional and technical teams to design, develop, test, and implement a minimum viable product (MVP) for the my Turn application within 10 days of the project start. The myTurn system became the clinicians and Californians' main public source for COVID-19 vaccine eligibility information and supports appointment scheduling in 14 languages.**
- **Managed the expanded vaccination management capabilities beyond COVID-19 into the State's administration of flu vaccines**
- **Oversaw the design, development, test, and implementation of over 80 vaccine management feature releases that were deployed within a span of eight months**
- **Managed the communication of the vaccine management program functional releases/enhancements to the Local Health Jurisdictions (LHJs) via the weekly LHJ Council meetings; the LHJs' executives utilized the information to make decisions about opting in/out of the vaccine management application features**
- **Collaborates with the Vaccine Management Program's director and program management on the project's direction and strategies**
- **Serves as an executive-level escalation point for topics and concerns raised by CDPH executives and Accenture team leads**
- **Manages application release priorities and the development of estimates, scoping, and requirements for application enhancements through implementation**
- **Manages the creation and execution of plans and processes that governed multiple teams, including organization charts, project personnel rosters, and roles and responsibilities**

Effectiveness and Coordination

- **Collaborates with the CDPH program management contractor and monitors the effectiveness of interactions between the Accenture delivery team and CDPH program management contractor**
- **Monitors and clarifies lines of delineation between and among teams and contractors**

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

- Provides coordination services to confirm all team members remain aligned with CDPH goals, schedules, and strategic initiatives via twice-weekly meetings with Accenture team leads
- Leads, facilitates, and presents project status updates at the weekly and monthly Vaccine Management Program's Program Status meeting series that includes participants from CDPH executives and the CDPH program management contractor; also manages the collection of project status inputs from the CDPH team and CDPH program management contractor

Testing

- Coordinates timing and entry/exit criteria associated with design, build, test, and delivery across the Accenture delivery teams and CDPH Program Management
- Provides input into testing efforts for myCAvax feature releases and enhancements

Aligning Teams

- Serves as first point of contact to resolve disputes between and/or among delivery teams and an executive-level escalation for concerns raised by CDPH executives
- Resolves conflicting tasks, priorities, and resources for the delivery of vaccine management application releases and maintenance and operations
- Provides input into the determination of project priorities, including application release priorities and strategies, to support CDPH's delivery of vaccine eligibility support to clinicians and Californians
- Aligns teams to enable Vaccine Management project success

Reporting and Communication

- Presents project status updates Vaccine Management Program's Program Status meeting series that occurs weekly and monthly (twice daily during the project's initial design, development, and implementation phase) and includes participants from CDPH executives (including the CIO, Epidemiologist, Chief Field Services Officer, and Program Coordination) and the CDPH program management contractor
- Provides status updates and strategic input during Program Strategy meetings that includes the CDPH Director and Deputy Director
- Provides reports and metrics regarding the effectiveness and timeliness of team interactions
- Communicates and reports on CDPH matters on an ongoing basis

Project #2	Contact #2
Company Name: California Office of Systems Integration, Covered California	Contact Name: [REDACTED]
Project Name: CalHEERS	Company Name: [REDACTED]
Time Period: June 1, 2012 – April 22, 2020	Phone Number: [REDACTED]

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE	
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Application Development and Integration Lead	
Description of relevant experience:	
<p>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.</p> <p>The CalHEERS project meets the definition of a "large and complex IT system," based on the following criteria defined in the RFP:</p> <ul style="list-style-type: none"> • Integrates with at least two applications, one of which is a COTS: The CalHEERS solution integrated with eight COTS applications, including Oracle and GetInsured, for healthcare eligibility, enrollment, and billing. • Interfaces with at least five external systems, at least one of which is real-time: The CalHEERS solution integrated with the Department of Health Care Services MEDS system (real time), as well as the California Statewide Automated Welfare systems, including C-IV (consortium of 39 counties), LEADER Replacement System (LRS), Los Angeles County, and CalWIN (consortium of 18 counties). Additional legacy systems interfaced to insurance carriers, State and federal verification services, and systems of organizations such as Franchise Tax Board (FTB), Employment Development Department (EDD), and the Internal Revenue Service. • Is accessed by at least 1,000 users at multiple locations: The CalHEERS solution was accessed by 5.5 million users in multiple locations. • Has a contract value of at least \$10,000,000 dollars: The total contract value was approximately \$1,090,000,000. • Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The CalHEERS solution included a customer-facing user interface built on REACT that was optimized for a mobile and desktop experience. The solution included an application and data layer along with a rules engine and implemented micro-services to access various services across the solution. <p>As the CalHEERS Application Development and Integration Lead, James's responsibilities included:</p> <p>Leadership and Program Scope Management</p> <ul style="list-style-type: none"> • Managed and coordinated multidisciplinary teams for design, development, and testing for the CalHEERS Project • Managed more than 100 professionals across multidisciplinary teams that performed over 100,000 hours of work annually • Led the successful on-time design, development, and implementation of the CalHEERS system that was delivered within 14 months. This effort involved working with the COO, CTO and the Executive Director of Covered California (the California Health Benefit Exchange) on a regular basis to determine key priorities and strategic drivers of maximizing consumer enrollment and retention • Led design, development, and test teams through the CalHEERS project's software development lifecycle (SDLC) including requirements analysis of over 700 business and technical requirements and creation of functional and detailed designs to satisfy those requirements • Led the successful integration of the state health benefit exchange with the county-based SAWS eligibility systems and the federal hub 	

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

- **Managed the design, development and implementation of system enhancements for the CalHEERS system for bi-monthly baseline releases and emergency releases.** Managed the end-to-end process for over 1,000 change requests for system enhancements. This included coordinating Accenture functional and technical teams on requirements analysis, scoping and solutioning, and developing project plans and solution estimates through implementation and deployment. James also collaborated with CalHEERS, Covered California and DHCS executives on the reviews and approvals of change requests.
- Led the successful user experience (UX)/user interface (UI) redesign of the health benefit exchange website and portal using user-centered design principles
- Worked across the service delivery lifecycle on engineering solutions for new integrations including system rollouts, major and minor enhancements, and/or ongoing maintenance of existing applications

Effectiveness and Coordination

- Collaborated with the CalHEERS program management and executives to monitor the effectiveness of interactions between the Accenture delivery team and other CalHEERS contractors, such as the CalHEERS training contractor and GetInsured
- As a contributing member to the Executive Steering Committee, drove key program and policy decisions with executive leadership at Covered California and DHCS; collaborated with CalHEERS, the California Department of Healthcare Services (DHCS), and Covered California to develop release plans and the 24-month roadmap
- Worked with Covered California's Executive Director, COO and CTO regularly to determine key priorities and strategic drivers of maximizing consumer enrollment and retention
- Consulted with Covered California on key business decisions on service center support, health plan offerings, and the selection and enrollment processes
- Managed the Development and Maintenance teams' work effort and promoted adherence to budget, schedule, and scope
- Managed the development and delivery of design deliverables and work products

Testing

- Directed a change request process, system integration testing, user acceptance testing, and federal authorization to connect testing
- Developed and updated project plans and objectives, system specifications, and rollout schedules
- Monitored system operations and performance throughout implementation and go-live and coordinated with the CalHEERS production operations team lead to resolve issues relating to system performance

Aligning Teams

- Serves as an executive-level escalation point for topics and concerns raised by CalHEERS, Covered California, and DHCS executives and Accenture team leads
- Resolved conflicting tasks, priorities, and resources for the delivery of system enhancements and application releases for the CalHEERS system
- Provides input into the determination of project priorities, including CalHEERS application releases and the CalHEERS 24-month roadmap

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

systems: myCAvax, My Turn, and Digital Vaccine Record (DVR). Each system is an integrated digital system and end-to-end user experience, including ongoing enhancements and agile-based feature releases

- Oversaw the design, development, test and implementation of the statewide vaccination system that supports the inoculation of 50,000 people daily at peak (and over 86M Californians to date) and the statewide clinic operations support to 9,000+ providers, Local Health Jurisdictions (LHJs), and counties
- Led the coordination of functional and technical teams to design, develop, test, and implement a minimum viable product (MVP) for the my Turn application within 10 days of the project start. The myTurn system became the clinicians and Californians' main public source for COVID-19 vaccine eligibility information and supports appointment scheduling in 14 languages.
- Managed the expanded vaccination management capabilities beyond COVID-19 into the State's administration of flu vaccines
- Oversaw the design, development, test, and implementation of over 80 vaccine management feature releases that were deployed within a span of eight months
- Managed the communication of the vaccine management program functional releases/enhancements to the Local Health Jurisdictions (LHJs) via the weekly LHJ Council meetings; the LHJs' executives utilized the information to make decisions about opting in/out of the vaccine management application features
- **Collaborates with the Vaccine Management Program's director and program management on the project's direction and strategies**
- Serves as an executive-level escalation point for topics and concerns raised by CDPH executives and Accenture team leads
- Manages application release priorities and the development of estimates, scoping, and requirements for application enhancements through implementation
- Manages the creation and execution of plans and processes that governed multiple teams, including organization charts, project personnel rosters, and roles and responsibilities

Effectiveness and Coordination

- **Collaborates with the CDPH program management contractor and monitors the effectiveness of interactions between the Accenture delivery team and CDPH program management contractor**
- Monitors and clarifies lines of delineation between and among teams and contractors
- Provides coordination services to confirm all team members remain aligned with CDPH goals, schedules, and strategic initiatives via twice-weekly meetings with Accenture team leads
- Leads, facilitates, and presents project status updates at the weekly and monthly Vaccine Management Program's Program Status meeting series that includes participants from CDPH executives and the CDPH program management contractor; also manages the collection of project status inputs from the CDPH team and CDPH program management contractor

Testing

- Coordinates timing and entry/exit criteria associated with design, build, test, and delivery across the Accenture delivery teams and CDPH Program Management
- Provides input into testing efforts for myCAvax feature releases and enhancements

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

- Provides input into the determination of project priorities, including application release priorities and strategies, to support CDPH's delivery of vaccine eligibility support to clinicians and Californians
- Aligns teams to enable Vaccine Management project success
- Serves as first point of contact to resolve disputes between and/or among delivery teams and an executive-level escalation for concerns raised by CDPH executives
- Resolves conflicting tasks, priorities, and resources for the delivery of vaccine management application releases and maintenance and operations

Reporting and Communication

- Presents project status updates Vaccine Management Program's Program Status meeting series that occurs weekly and monthly (twice daily during the project's initial design, development, and implementation phase) and includes participants from CDPH executives (including the CIO, Epidemiologist, Chief Field Services Officer, and Program Coordination) and the CDPH program management contractor
- Provides status updates and strategic input during Program Strategy meetings that includes the CDPH Director and Deputy Director
- Provides reports and metrics regarding the effectiveness and timeliness of team interactions
- Communicates and reports on CDPH matters on an ongoing basis

Project #2	Contact #2
Company Name: California Office of Systems Integration, Covered California	Contact Name: [REDACTED]
Project Name: CalHEERS	Company Name: [REDACTED]
Time Period: June 1, 2012 – April 22, 2020	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Application Development and Integration Lead	
Description of relevant experience:	
MQ ME S-12 A minimum of two (2) years of experience coordinating integration services on a Project similar in size and scale to the CalSAWS.	
As the CalHEERS Application Development and Integration Lead, James's responsibilities included:	

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

Leadership and Program Scope Management

- Managed and coordinated multidisciplinary teams for design, development, and testing for the CalHEERS Project
- Managed more than 100 professionals across multidisciplinary teams that performed over 100,000 hours of work annually
- Led the successful on-time design, development, and implementation of the CalHEERS system that was delivered within 14 months. This effort involved working with the COO, CTO and the Executive Director of Covered California (the California Health Benefit Exchange) on a regular basis to determine key priorities and strategic drivers of maximizing consumer enrollment and retention. The CalHEERS system serves over 1.5 million users as part of the Covered CA exchange and over 10 million users through State and County-run programs.
- Led design, development, and test teams through the CalHEERS project's software development lifecycle (SDLC) including requirements analysis of over 700 business and technical requirements and creation of functional and detailed designs to satisfy those requirements
- Led the successful integration of the state health benefit exchange with the county-based SAWS eligibility systems and the federal hub
- Managed the design, development and implementation of system enhancements for the CalHEERS system for bi-monthly baseline releases and emergency releasesManaged the end-to-end process for over 1,000 change requests for system enhancements. This included coordinating Accenture functional and technical teams on requirements analysis, scoping and solutioning, and developing project plans and solution estimates through implementation and deployment. James also collaborated with CalHEERS, Covered California and DHCS executives on the reviews and approvals of change requests.
- Led the successful UX/UI redesign of the health benefit exchange website and portal using user-centered design principles
- Worked across the service delivery lifecycle on engineering solutions for new integrations including system rollouts, major and minor enhancements, and/or ongoing maintenance of existing applications

Effectiveness and Coordination

- Collaborated with the CalHEERS program management and executives to monitor the effectiveness of interactions between the Accenture delivery team and other CalHEERS contractors, such as the CalHEERS training contractor and GetInsured
- As a contributing member to the Executive Steering Committee, drove key program and policy decisions with executive leadership at Covered California and DHCS; collaborated with CalHEERS, the California Department of Healthcare Services (DHCS), and Covered California to develop release plans and the 24-month roadmap
- Worked with Covered California's Executive Director, COO and CTO regularly to determine key priorities and strategic drivers of maximizing consumer enrollment and retention
- Consulted with Covered California on key business decisions on service center support, health plan offerings, and the selection and enrollment processes
- Managed the Development and Maintenance teams' work effort and promoted adherence to budget, schedule, and scope
- Managed the development and delivery of design deliverables and work products

Testing

- Directed a change request process, system integration testing, user acceptance testing, and federal authorization to connect testing

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE		
<ul style="list-style-type: none">Developed and updated project plans and objectives, system specifications, and rollout schedulesMonitored system operations and performance throughout implementation and go-live and coordinated with the CalHEERS production operations team lead to resolve issues relating to system performance		
Aligning Teams		
<ul style="list-style-type: none">Serves as an executive-level escalation point for topics and concerns raised by CalHEERS, Covered California, and DHCS executives and Accenture team leadsResolved conflicting tasks, priorities, and resources for the delivery of system enhancements and application releases for the CalHEERS systemProvides input into the determination of project priorities, including CalHEERS application releases and the CalHEERS 24-month roadmapAligns teams to enable CalHEERS project success		
Reporting and Communication		
<ul style="list-style-type: none">Presented project status updates to the CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at weekly project status meetingsPresented project status updates and topics related to project priorities to CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at CalHEERS Project Steering Committee meetingsPresented project status updates at the Assembly Bill (AB) 1296 Stakeholder meeting series that was facilitated by DHCS and included advocate and stakeholder groupsPresented proposed system enhancements to the CalHEERS Change Control Board (CCB) at weekly CCB meetings		
Total Duration of all Projects cited to meet the MQ:		10 years
Minimum Qualification ME-S13	At least two (2) years of Full-Time Equivalent (FTE) experience utilizing traditional and iterative solution delivery methodologies.	
Project #1	Contact #1	
Company Name: California Department of Public Health (CDPH)	Contact Name: [REDACTED]	
Project Name: CDPH Vaccine Management	Company Name: [REDACTED]	
Time Period: December 1, 2020 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: CDPH Client Account Lead (Equivalent to Delivery Integration Manager)		
Description of relevant experience:		

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

MQ ME-S13 At least two (2) years of Full-Time Equivalent (FTE) experience utilizing traditional and iterative solution delivery methodologies.

As CDPH Client Account Lead, James's responsibilities include:

Leadership and Program Scope Management

- Manages and coordinates work across multidisciplinary teams across all workstreams for the Vaccine Management Program, which is comprised of 270 Accenture personnel (over 700 Accenture personnel at peak)
- **Manages the delivery teams' collaboration with CDPH Program Management through backlog and user story refinement (requirements gathering), and the design, development, and testing enhancements via iterative agile sprints.** Also manages the greenlight (go-no/go) process for feature releases. The Vaccine Management Program's software development lifecycle is based on iterative agile methodology
- Leads and coordinates the functional, analytics and reporting, service desk, integrations (MuleSoft, CalREDIE), security, marketing, program and project management, communications, technical and training teams to develop and implement the three vaccine management systems: myCAvax, My Turn, and Digital Vaccine Record (DVR). Each system is an integrated digital system and end-to-end user experience, including ongoing enhancements and agile-based feature releases
- Oversaw the design, development, test and implementation of the statewide vaccination system that supports the inoculation of 50,000 people daily at peak (and over 86M Californians to date) and the statewide clinic operations support to 9,000+ providers, Local Health Jurisdictions (LHJs), and counties
- Led the coordination of functional and technical teams to design, develop, test, and implement a minimum viable product (MVP) for the my Turn application within 10 days of the project start. The myTurn system became the clinicians and Californians' main public source for COVID-19 vaccine eligibility information and supports appointment scheduling in 14 languages.
- Managed the expanded vaccination management capabilities beyond COVID-19 into the State's administration of flu vaccines
- Oversaw the design, development, test, and implementation of over 80 vaccine management feature releases that were deployed within a span of eight months
- Managed the communication of the vaccine management program functional releases/enhancements to the Local Health Jurisdictions (LHJs) via the weekly LHJ Council meetings; the LHJs' executives utilized the information to make decisions about opting in/out of the vaccine management application features
- Collaborates with the Vaccine Management Program's director and program management on the project's direction and strategies
- Serves as an executive-level escalation point for topics and concerns raised by CDPH executives and Accenture team leads
- Manages application release priorities and the development of estimates, scoping, and requirements for application enhancements through implementation
- Manages the creation and execution of plans and processes that governed multiple teams, including organization charts, project personnel rosters, and roles and responsibilities

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE**Effectiveness and Coordination**

- Collaborates with the CDPH program management contractor and monitors the effectiveness of interactions between the Accenture delivery team and CDPH program management contractor
- Monitors and clarifies lines of delineation between and among teams and contractors
- Provides coordination services to confirm all team members remain aligned with CDPH goals, schedules, and strategic initiatives via twice-weekly meetings with Accenture team leads
- Leads, facilitates, and presents project status updates at the weekly and monthly Vaccine Management Program's Program Status meeting series that includes participants from CDPH executives and the CDPH program management contractor; also manages the collection of project status inputs from the CDPH team and CDPH program management contractor

Testing

- Coordinates timing and entry/exit criteria associated with design, build, test, and delivery across teams and contractors when multiple parties are required to implement a change or add a capability
- Provides input into testing efforts for myCAvax feature releases and enhancements

Aligning Teams

- Provides input into the determination of project priorities, including application release priorities and strategies, to support CDPH's delivery of vaccine eligibility support to clinicians and Californians
- Aligns teams to enable Vaccine Management project success
- Serves as first point of contact to resolve disputes between and/or among delivery teams and an executive-level escalation for concerns raised by CDPH executives
- Resolves conflicting tasks, priorities, and resources for the delivery of vaccine management application releases and maintenance and operations

Reporting and Communication

- Presents project status updates Vaccine Management Program's Program Status meeting series that occurs weekly and monthly (twice daily during the project's initial design, development, and implementation phase) and includes participants from CDPH executives (including the CIO, Epidemiologist, Chief Field Services Officer, and Program Coordination) and the CDPH program management contractor
- Provides status updates and strategic input during Program Strategy meetings that includes the CDPH Director and Deputy Director
- Provides reports and metrics regarding the effectiveness and timeliness of team interactions
- Communicates and reports on CDPH matters on an ongoing basis

Project #2**Contact #2**

Company Name: California Office of Systems Integration, Covered California

Contact Name: [REDACTED]

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE			
Project Name: CalHEERS		Company Name: [REDACTED]	
Time Period: June 1, 2012 – April 22, 2020		Phone Number: [REDACTED]	
Percentage of Time: 100%		Email: [REDACTED]	
Staff Role: Application Development and Integration Lead			
Description of relevant experience:			
<p>MQ ME-S13 At least two (2) years of Full-Time Equivalent (FTE) experience utilizing traditional and iterative solution delivery methodologies.</p> <p>As the CalHEERS Application Development and Integration Lead, James's responsibilities included:</p> <p>Leadership and Program Scope Management</p> <ul style="list-style-type: none"> • Oversaw the CalHEERS project's application design, development, and test teams that delivered CalHEERS system changes for bi-monthly baseline releases and emergency releases • Managed the project's traditional, waterfall-based SDLC process for the design, development, test, and deployment of system changes for bi-monthly and emergency releases, including the design reviews with subject matter experts from DHCS, Covered California, CWDA, and integration testing with the SAWS projects, the federal verification hub, and other interface partners • Led the successful UX/UI redesign of the health benefit exchange website and portal using user-centered design principles • Managed iterative delivery methodologies for the health benefit exchange website and portal's user UX/UI redesign changes; backlog refinement, sprint planning and sprint review sessions were conducted in two-week cycles with DHCS, CoveredCA, CalHEERS and CWDA SMEs to review, iterate and approve designs until a feature was considered complete by DHCS and CoveredCA. Development and test were completed in two-week sprints until completed prior to handing over to UAT and ultimately the implementation of the completed redesign • Led the successful on-time design, development, and implementation of the CalHEERS system that was delivered within 14 months. This effort involved working with the COO, CTO and the Executive Director of Covered California (the California Health Benefit Exchange) on a regular basis to determine key priorities and strategic drivers of maximizing consumer enrollment and retention • Led design, development, and test teams through the CalHEERS project's software development lifecycle (SDLC) including requirements analysis of over 700 business and technical requirements and creation of functional and detailed designs to satisfy those requirements • Led the successful integration of the state health benefit exchange with the county-based SAWS eligibility systems and the federal hub • Managed the design, development and implementation of system enhancements for the CalHEERS system for bi-monthly baseline releases and emergency releases • Managed the end-to-end process for over 1,000 change requests for system enhancements. This included coordinating Accenture functional and technical teams on requirements analysis, scoping and solutioning, and developing project plans and solution estimates through implementation and deployment. James also collaborated with CalHEERS, Covered California and DHCS executives on the reviews and approvals of change requests. 			

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

- Worked across the service delivery lifecycle on engineering solutions for new integrations including system rollouts, major and minor enhancements, and/or ongoing maintenance of existing applications

Effectiveness and Coordination

- Collaborated with the CalHEERS program management and executives to monitor the effectiveness of interactions between the Accenture delivery team and other CalHEERS contractors, such as the CalHEERS training contractor and GetInsured
- As a contributing member to the Executive Steering Committee, drove key program and policy decisions with executive leadership at Covered California and DHCS; collaborated with CalHEERS, the California Department of Healthcare Services (DHCS), and Covered California to develop release plans and the 24-month roadmap
- Worked with Covered California's Executive Director, COO and CTO regularly to determine key priorities and strategic drivers of maximizing consumer enrollment and retention
- Consulted with Covered California on key business decisions on service center support, health plan offerings, and the selection and enrollment processes
- Managed the Development and Maintenance teams' work effort and promoted adherence to budget, schedule, and scope
- Managed the development and delivery of design deliverables and work products

Testing

- Directed a change request process, system integration testing, user acceptance testing, and federal authorization to connect testing
- Developed and updated project plans and objectives, system specifications, and rollout schedules
- Monitored system operations and performance throughout implementation and go-live and coordinated with the CalHEERS production operations team lead to resolve issues relating to system performance

Aligning Teams

- Serves as an executive-level escalation point for topics and concerns raised by CalHEERS, Covered California, and DHCS executives and Accenture team leads
- Resolved conflicting tasks, priorities, and resources for the delivery of system enhancements and application releases for the CalHEERS system
- Provides input into the determination of project priorities, including CalHEERS application releases and the CalHEERS 24-month roadmap
- Aligns teams to enable CalHEERS project success

Reporting and Communication

- Presented project status updates to the CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at weekly project status meetings
- Presented project status updates and topics related to project priorities to CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at CalHEERS Project Steering Committee meetings

PART 2 – M&E DELIVERY INTEGRATION MANAGER MINIMUM QUALIFICATIONS TABLE		
<ul style="list-style-type: none">Presented project status updates at the Assembly Bill (AB) 1296 Stakeholder meeting series that was facilitated by DHCS and included advocate and stakeholder groupsPresented proposed system enhancements to the CalHEERS Change Control Board (CCB) at weekly CCB meetings		
Total Duration of all Projects cited to meet the MQ:		10 years
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: California Department of Public Health (CDPH)	Contact Name: [REDACTED]	
Project Name: CDPH Vaccine Management	Company Name: [REDACTED]	
Time Period: December 1, 2020 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: CDPH Client Account Lead		
Description of relevant experience:		
<p>MQ ME-S14 A minimum of five (5) years of experience within the past ten (10) years building and maintaining strong working relationships with clients and key internal and external stakeholders; conveying relevant information to an executive-level audience, ensuring client is aware of progress/service status; and building credibility and fostering business-partnering relationships.</p> <p>As the CDPH Client Account Lead, James's responsibilities include:</p> <p>Leadership and Program Scope Management</p> <ul style="list-style-type: none">Builds and maintains strong working relationships with CDPH and key internal and external stakeholdersLeads, facilitates, and presents project status updates at the weekly and monthly Vaccine Management Program's Program Status meeting series that includes participants from CDPH executives and the CDPH program management contractor; also manages the collection of project status inputs from the CDPH team and CDPH program management contractor		

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

- Collaborates with the Vaccine Management Program's director and program management on the project's direction and strategies, and presents solution options and recommendations
 - Presents project status updates Vaccine Management Program's Program Status meeting series that occurs weekly and monthly (twice daily during the project's initial design, development, and implementation phase) and includes participants from CDPH executives (including the CIO, Epidemiologist, Chief Field Services Officer, and Program Coordination) and the CDPH program management contractor
 - Provides status updates and strategic input during Program Strategy meetings that includes the CDPH Director and Deputy Director
 - Managed the communication of the vaccine management program functional releases/enhancements to the Local Health Jurisdictions (LHJs) via the weekly LHJ Council meetings; the LHJs' executives utilized the information to make decisions about opting in/out of the vaccine management application features
 - Manages and coordinates work across multidisciplinary teams across all workstreams for the Vaccine Management Program, which is comprised of 270 Accenture personnel (over 700 Accenture personnel at peak)
 - Leads and coordinates the functional, analytics and reporting, service desk, integrations (MuleSoft, CalREDIE), security, marketing, program and project management, communications, technical and training teams to develop and implement the three vaccine management systems: myCAVax, My Turn, and Digital Vaccine Record (DVR). Each system is an integrated digital system and end-to-end user experience, including ongoing enhancements and agile-based feature releases
 - Oversaw the design, development, test and implementation of the statewide vaccination system that supports the inoculation of 50,000 people daily at peak (and over 86M Californians to date) and the statewide clinic operations support to 9,000+ providers, Local Health Jurisdictions (LHJs), and counties
 - Led the coordination of functional and technical teams to design, develop, test, and implement a minimum viable product (MVP) for the my Turn application within 10 days of the project start. The myTurn system became the clinicians and Californians' main public source for COVID-19 vaccine eligibility information and supports appointment scheduling in 14 languages.
 - Managed the expanded vaccination management capabilities beyond COVID-19 into the State's administration of flu vaccines
 - Oversaw the design, development, test, and implementation of over 80 vaccine management feature releases that were deployed within a span of eight months
 - Serves as an executive-level escalation point for topics and concerns raised by CDPH executives and Accenture team leads
 - Manages application release priorities and the development of estimates, scoping, and requirements for application enhancements through implementation
 - Manages the creation and execution of plans and processes that governed multiple teams, including organization charts, project personnel rosters, and roles and responsibilities
- Effectiveness and Coordination**
- Collaborates with the CDPH program management contractor and monitors the effectiveness of interactions between the Accenture delivery team and CDPH program management contractor
 - Monitors and clarifies lines of delineation between and among teams and contractors

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

- Provides coordination services to confirm all team members remain aligned with CDPH goals, schedules, and strategic initiatives via twice-weekly meetings with Accenture team leads

Testing

- Coordinates timing and entry/exit criteria associated with design, build, test, and delivery across the Accenture delivery teams and CDPH Program Management
- Provides input into testing efforts for myCAvax feature releases and enhancements

Aligning Teams

- Provides input into the determination of project priorities, including application release priorities and strategies, to support CDPH's delivery of vaccine eligibility support to clinicians and Californians
- Aligns teams to enable Vaccine Management project success
- Serves as first point of contact to resolve disputes between and/or among delivery teams and an executive-level escalation for concerns raised by CDPH executives
- Resolves conflicting tasks, priorities, and resources for the delivery of vaccine management application releases and maintenance and operations

Project #2**Contact #2**

Company Name: California Office of Systems Integration, Covered California

Contact Name: [REDACTED]

Project Name: CalHEERS

Company Name: [REDACTED]

Time Period: June 1, 2012 – April 22, 2020

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Application Development and Integration Lead

Description of relevant experience:

MQ 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.

As the CalHEERS Application Development and Integration Lead, James's responsibilities included:

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

Leadership and Program Scope Management

- Built and maintained strong working relationships with CalHEERS, Covered California, DHCS, and other key internal and external stakeholders for the CalHEERS Project for over seven years
- Conveyed relevant information to an executive-level audience, making sure the CalHEERS team was aware of progress/service status
- Built credibility and fostered business-partnering relationships across teams and contractors
- As a contributing member to the Executive Steering Committee, drove key program and policy decisions with executive leadership at Covered California and DHCS; collaborated with CalHEERS, the California Department of Healthcare Services (DHCS), and Covered California to develop release plans and the 24-month roadmap
- Worked with Covered California's Executive Director, COO and CTO regularly to determine key priorities and strategic drivers of maximizing consumer enrollment and retention
- Presented project status updates to the CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at weekly project status meetings
- Presented project status updates and topics related to project priorities to CalHEERS executives, Covered California's Executive Director, COO and CTO, and DHCS executives at CalHEERS Project Steering Committee meetings
- Presented project status updates at the Assembly Bill (AB) 1296 Stakeholder meeting series that was facilitated by DHCS and included advocate and stakeholder groups
- Consulted with Covered California executives on key business decisions on service center support, health plan offerings, and the selection and enrollment processes
- Led the successful UX/UI redesign of the health benefit exchange website and portal using user-centered design principles
- Led the successful on-time design, development, and implementation of the CalHEERS system that was delivered within 14 months. This effort involved working with the COO, CTO and the Executive Director of Covered California (the California Health Benefit Exchange) on a regular basis to determine key priorities and strategic drivers of maximizing consumer enrollment and retention
- Led design, development, and test teams through the CalHEERS project's software development lifecycle (SDLC) including requirements analysis of over 700 business and technical requirements and creation of functional and detailed designs to satisfy those requirements
- Led the successful integration of the state health benefit exchange with the county-based SAWS eligibility systems and the federal hub
- Managed the design, development and implementation of system enhancements for the CalHEERS system for bi-monthly baseline releases and emergency releasesManaged the end-to-end process for over 1,000 change requests for system enhancements. This included coordinating Accenture functional and technical teams on requirements analysis, scoping and solutioning, and developing project plans and solution estimates through implementation and deployment. **James also collaborated with CalHEERS, Covered California and DHCS executives on the reviews and approvals of change requests.**
- Worked across the service delivery lifecycle on engineering solutions for new integrations including system rollouts, major and minor enhancements, and/or ongoing maintenance of existing applications

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

Effectiveness and Coordination

- Collaborated with the CalHEERS program management and executives to monitor the effectiveness of interactions between the Accenture delivery team and other CalHEERS contractors, such as the CalHEERS training contractor and GetInsured
- Managed the Development and Maintenance teams' work effort and promoted adherence to budget, schedule, and scope
- Managed the development and delivery of design deliverables and work products

Testing

- Directed a change request process, system integration testing, user acceptance testing, and federal authorization to connect testing
- Developed and updated project plans and objectives, system specifications, and rollout schedules
- Monitored system operations and performance throughout implementation and go-live and coordinated with the CalHEERS production operations team lead to resolve issues relating to system performance

Aligning Teams

- Serves as an executive-level escalation point for topics and concerns raised by CalHEERS, Covered California, and DHCS executives and Accenture team leads
- Resolved conflicting tasks, priorities, and resources for the delivery of system enhancements and application releases for the CalHEERS system
- Provides input into the determination of project priorities, including CalHEERS application releases and the CalHEERS 24-month roadmap
- Aligns teams to enable CalHEERS project success

Total Duration of all Projects cited to meet the MQ:

9 years, 5 months



1.4 M&E TRANSITION MANAGER STAFF QUALIFICATIONS

M&E TRANSITION MANAGER			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	Rick Costa		
Position in the Company	Managing Director	Length of Time in Position	1 year
Project Position & Responsibilities	M&E Transition Manager Project responsibilities will be as defined in RFP section 13.1.3.6.4.		
Skills & Qualifications for Project Position	<p>Skills: Rick is an experienced transition manager who uses his skills in project management, change management, transition, journey management, and collaboration to help clients complete IT-based transitions to new and modernized platforms and systems. Rick is a planner who creates transition approaches (methodology, description of work streams, activities, and deliverables) that lead to stable cutovers. He is a leader of cross-functional delivery teams and a collaborator who works beside his clients during transitions.</p> <p>Qualifications: For 16 years, Rick has managed and delivered operational transition activities on projects involving large and complex IT systems (MQ ME-S15: Exceeds) for clients in several industries, including healthcare, federal government, and pharmaceutical. He has delivered transition programs with complex transformational and technology shifts using waterfall and agile delivery methods. He has delivered transition-related services across major offering segments—platform, end user, service management, human resources, network, security, and next-generation services, including cloud and big data. As a transition manager, Rick manages the successful transition of large and complex IT systems from one company or contract to another, and he has done so on more than two projects. To comply with client non-disclosure agreements (NDAs), we highlight three projects here, each lasting longer than the minimum duration of three months (MQ ME-S16: Meets). He has led projects and programs in major industries with highly complex operating environments, applications, infrastructure build, migration to cloud, operations establishment, and service desk integration.</p>		
Relevant Experience (Add additional tables as needed)			
Project Title	OhioHealth IT Outsourcing (ITO) project		
Position Title	Transition Manager		
Begin Date	03/2022	End Date	01/2023
		# of Months	10
Scope and Description of Responsibility	<p>Scope: Rick oversaw staffing and technology enablement, managed transition governance, and established process-related changes for infrastructure, security, and applications.</p> <p>Responsibility: Rick set up the core project group with a team of 100 personnel to define the new model and the demand management process and then led a global team of 700 personnel who work on this full IT</p>		

M&E TRANSITION MANAGER			
	<p>Outsourcing (ITO) project that includes infrastructure, applications, security, and IT services for clinical staff and 12 hospital locations. Rick transitioned Levels 1–3 support and shared Level 4 support for engineering and design. A unique element of this ITO project is the clinical service desk, used by doctors, nurses, and medical technicians, and supporting the varied technology in a hospital setting, such as handhelds, imaging and scanning equipment, electronic medical records (EMR), and ancillary hospital/medical systems. Another unique feature to this transition was the implementation of myWizard, an Accenture-proprietary automation tool to help the client improve processes. The project was successfully completed on time.</p>		
Skills Utilized and Experience Attained	<p>Skills Utilized: Rick managed the project using Project Management Institute (PMI) project management practices, such as integration management, scope management, schedule management, and risk management. His other skills include customer and contractor relationship management. Rick uses his communication skills to develop sponsorship/support within affected organizations and manages stakeholder expectations during organizational change management activities. His project management skills, which he applied to transition engagements in numerous industries, include Information Technology Infrastructure Library (ITIL) v3 Foundation and PRINCE2 certifications, confirming he uses standardized, repeatable practices on each transition.</p> <p>Experience Attained: Rick managed the transition of applications and infrastructure for OhioHealth, a complete ITO project, along with its unique elements (service desk, hospital-specific technology including handheld devices and mobile carts, EMR, and imaging equipment). He transitioned 12 hospital locations, Levels 1–3 support, and shared Level 4 support for engineering and design in this highly complex operating environment. Rick also implemented myWizard, the Accenture-proprietary automation tool to improve client processes.</p>		
Project Title			
Position Title	Transition Manager		
Begin Date	04/2019	End Date	02/2020
			# of Months
			11
Scope and Description of Responsibility	<p>Scope: This project was a full, simultaneous infrastructure conversion that transitioned the company from a centralized core IT—that supported 200 applications, and 16 individual business units, each with 100 individual applications for downstream operations—to a consolidated ITO for standardized business unit operations.</p> <p>Responsibility: Rick led this first-time, comprehensive managed services outsourcing of a large multinational client into a multi-contractor operating model with Accenture as the main provider and service integrator. Leading a team of 350 personnel, he enabled services across more than 12 distinct service towers and 16 business units with waves of go-live over a four-month transition.</p>		
Skills Utilized and Experience Attained	<p>Skills Utilized: Rick used his expertise in PMI-established project management practices, change management, transition, journey management, communication and collaboration to manage and lead the contracting, development of solution design, and overall program. He also applied Library (ITIL) v3 Foundation and PRINCE2 standards in the solution designs and transition procedures.</p>		

M&E TRANSITION MANAGER				
Experience Attained: Rick managed the successful transition of infrastructure and application services across all major service areas. He developed a digital dashboard reporting tool for stakeholders and project personnel to access project status in real time.				
Project Title	The Nature's Bounty Company IT Outsourcing			
Position Title	Transition Manager			
Begin Date	08/2017	End Date	03/2018	# of Months 8
Scope and Description of Responsibility	Scope: Rick transitioned this client's multi-contractor operating model (business processes, application services, infrastructure, and security) into a single-source model with Accenture as the main provider/service integrator. Responsibility: Rick led the comprehensive managed services outsourcing of a large global manufacturing client with multiple facilities. He led a global team of 280 personnel across application and infrastructure services. He was responsible for resource allocation, creating and managing the project plan, leading the executive steering committee, and facilitating stakeholder meetings.			
Skills Utilized and Experience Attained	Skills: Rick used his expertise in PMI-established project management practices, change management, transition, journey management, and collaboration to manage and lead the contracting, solution design, and overall program. He applied Library (ITIL) v3 Foundation and PRINCE2 standards in the solution designs and transition procedures. Experience: Rick led the transition of remaining services within 3.5 months with no production disruption and a 30% improvement on ticket resolution over the first month of service. He also delivered a rapid transition within two months for critical services which mitigated personnel departure and impact to peak year-end activity.			
Education (add rows as needed)				
Years	Course of Study	School		
01/2013 – 06/2013	Professional Certification, Executive Leadership	Cornell University		
09/2001 – 05/2005	B.S., Management Information Systems	Pennsylvania State University (Penn State)		
Professional Certifications or Designations (add rows as needed)				
Certification or Designation	Organization	Dates		
Not applicable				

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.
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Project #1	Contact #1
Company Name: OhioHealth	Contact Name: [REDACTED]
Project Name: OhioHealth IT Outsourcing (ITO) project	Company Name: [REDACTED] h
Time Period: (Month, Day, Year – Month, Day, Year) March 1, 2022 – January 3, 2023	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]

Staff Role: Transition Manager

Description of relevant experience:

The OhioHealth project meets the definition of “large and complex IT system,” based on the following criteria defined in the RFP:

- Integrates with at least two applications, one of which is a COTS: The OhioHealth solution integrates with:
 - COTS applications including Python, Selenium, Blue Prism, Workday, ServiceNow, and Epic EMR
 - Accenture proprietary applications including myWizard and an anonymized master patient index
 - A patient intervention engine – an application that manages evidence-based treatment protocols for clinical care plans and monitors workflows for patient populations
 - A cohort manager engine – an application that translates laymen’s terms to clinical codes across multiple domains)
- Interfaces with at least five external systems, at least one of which is real-time:** OhioHealth interfaces with county health systems, local health departments, and pharmacies which are real time. Other interfaces include OhioHealth Research & Innovation Institute, the University of Texas MD Anderson Cancer Center, the Southeastern Ohio Regional Medical Center (a member of the Guernsey Health System (GHS), the Ohio State University Wexner Medical Center, medical laboratories, and Ohio Department of Health.
- Is accessed by at least 1,000 users at multiple locations:** The OhioHealth solution is accessed by 35,000 associates, physicians, and volunteers at health services locations in 47 Ohio counties: 12 hospitals, 200 ambulatory sites, and hospice, home health locations.
- Has a contract value of at least \$10,000,000 dollars:** The solution contract value is \$209 million.
- Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The OhioHealth solution includes a user-facing, multi-tiered, web-based portal application and accompanying mobile application that supports Android and Apple iOS platforms. Additionally, functionalities such as appointment scheduling, bill pay, Epic myChart, and other services are available.

As the Transition Manager, Rick’s responsibilities included:

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE**Project scope:**

- **Managed operational transition activities on OhioHealth, a large and complex IT system in the healthcare industry**
- **Managed all infrastructure transition-in activities to deliver a successful transition of infrastructure, applications, security, and IT services for clinical staff, 12 hospital locations, Levels 1–3 support and shared Level 4 support for engineering and design. The transition was successfully completed on time.**
- Led a global transition team of over 700 personnel, utilizing PMI, ITIL, and SAFe program management principles
- Managed the rapid service transition to mitigate 180+ client resource attrition with capacity staffing enabled and onboarded into operations within one month of Transition start
- Enabled client organizational change by leading a comprehensive Change Management program inclusive of internal/external communications, transformation measurements, surveys, and change champion teams, and supported the OhioHealth client in understanding the scope and schedule of end-to-end transition activities and the related organization change management plans
- Established client training academy for retained and impacted team members with mapped learnings aligned to new roles and market relevant skills
- Developed, delivered, and maintains an integrated master schedule/work plan for the full project scope, which included transition plans for infrastructure, applications, security, and automation
- Created a comprehensive risk management and service continuity plan to comply with attrition impacts, business criticality and OhioHealth's zero outage transition requirements
- Managed project risks and developed mitigation plans to minimize potential impact to end users and business operations during transition

Collaboration:

- Worked collaboratively with OhioHealth's existing IT services and hospital personnel to accomplish a smooth transition of all OhioHealth infrastructure components, including with the incumbent contractor to align on the roles and responsibilities, activities, and schedule for transitioning services. Also supported the OhioHealth client to manage staff transitions for OhioHealth's future organizational model.
- Collaborated with the OhioHealth transition manager to implement and manage a comprehensive project transition office and organizational change management team to manage transition activities and related communications and change management activities.
- Worked closely with the OhioHealth transition manager to plan, manage, execute, and close out transition activities and support alignment across transition teams.
- Led daily, weekly, and monthly meetings with OhioHealth executives and internal and external stakeholders to discuss the progress of transition activities

Project #2**Contact #2**

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

Company Name: [REDACTED]	Contact Name: [REDACTED] [REDACTED]
Project Name: IT systems transition	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) April 1, 2019 – February 28, 2020	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Transition Manager	

Description of relevant experience:

The IT systems transition project meets the definition of “large and complex IT system,” based on the following criteria defined in the RFP:

- Integrates with at least two applications, one of which is a COTS:** The transition of IT services at this client involved the support of all applications and underlying technology, including the integration with SAP HANA, a COTS enterprise resource planning (ERP) platform, and the retail point-of-sale system.
- Interfaces with at least five external systems, at least one of which is real-time:** The client’s IT services interface with several external systems, including affiliate systems, crude oil fields, manufacturing, surveillance, asset management, pipeline operations, micro seismic monitoring systems, environmental, finance, crane operation safety, supply chain, and the Refinery Optimization Center (ROC), which operates in real-time.
- Is accessed by at least 1,000 users at multiple locations:** The solution is accessed by over 8,000 users daily via point of sale (POS) terminals across 8,000 U.S. retail locations.
- Has a contract value of at least \$10,000,000 dollars:** The contract value is greater than \$200,000,000.
- Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The solution features multi-tiered processing, including a user-facing front end. For example, refinery operators use handheld devices to transmit equipment surveillance data to the ROC which collects and analyzes the incoming data to confirm proper operations. On the retail side, POS terminals are optimized for multiple user interface platforms.

As the Transition Manager, Rick’s responsibilities included:**Project scope:**

- Managed all operational transition activities to successfully transition all infrastructure and application services for the client’s large and complex IT system**
- Led the multi-vendor transition team of over 500 personnel, leveraging Azure DevOps for “single pane of glass” transition planning, monitoring, and execution aggregating all data and providing guided course corrections as needed

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

- Established centralized IT onboarding across client subsidiary business units reducing technology diversity, increasing operational efficiency, and simplifying ongoing operations
- Enabled new client business continuity capability across multiple Accenture delivery centers with service failover procedures that were fully developed and tested for the transition
- Created a comprehensive risk management, change management, and service continuity plan to comply with business criticality and the client's zero outage transition requirements and manage risks that may impact end users and business operations during the transition
- Developed and delivered a training plan for client and client's contractor personnel
- Created and implemented simultaneously 17 unique transition plans—one for the centralized core IT organization and 16 individual transition plans, one per for each business unit, which minimized impacts to end users and business operations during transition-in, service integration, and the end state
- Performed transition activities simultaneously alongside service integration activities

Collaboration:

- Worked collaboratively with client and client's contractor personnel to transition from a capacity services model to a managed services model, including leading joint planning sessions to align on roles and responsibilities, transition activities, integrated project schedule for the transition project
- Worked closely with the client's transition managers to plan, manage, and execute transition activities and 100 applications across one centralized core IT organization and 16 individual business units, including the development of standardized processes for operations
- Managed the project status reporting and communications processes for the transition, including leading daily, weekly, and monthly meeting series with client executives and internal and external stakeholders to discuss the plan for transition-in activities, project timelines, progress of transition activities, project risks, and impacts to operations
- Worked with the client's central IT team's transition manager and 16 business unit transition managers to close out transition activities

Project #3	Contact #3
Company Name: The Nature's Bounty Company	Contact Name: [REDACTED]
Project Name: IT Outsourcing	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) August 1, 2017 – March 31, 2018	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Transition Manager	
Description of relevant experience:	
The Nature's Bounty IT Outsourcing project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:	

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

1. Integrates **with at least two applications, one of which is a COTS**: The project included supporting applications and infrastructure from across the organization including the following COTS applications Oracle (Supply Chain, manufacturing, packaging, and product development), Oracle E-Business Suite (research, master data management), IBM AS-400 (warehouse distribution, order-to-cash, customer management, and EOD/EOM financials), Salesforce (CRM market cloud), and NetSuite (cloud business).
2. **Interfaces with at least five external systems, at least one of which is real-time**: All Nature's Bounty client internal and external interfaces were transitioned including BizTalk payment gateway, .Net legacy websites, Microsoft active directory federation services, Microsoft SSL certification management, Citrix workspace solutions, data, video, and voice services provided by third-party systems. All systems process data in real time.
3. **Is accessed by at least 1,000 users at multiple locations**: All client internal and external interfaces were transitioned to support with Accenture. Nature's Bounty has 13,000 employees with access to core systems, vendor and supplier systems, data warehouse, and online point of sale (POS) at multiple locations including the headquarters in Ronkonkoma, NY or the manufacturing and warehouse locations in NY, Canada, Spain, and the United Kingdom. The client has 3,000 users on the platforms transitioned to Accenture.
4. **Has a contract value of at least \$10,000,000 dollars**: The total contract value was approximately \$42,000,000.
5. **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms**: Transition support included a website for vendors (suppliers and products) and a consumer website (online store) with front-end optimized for multiple user interface platforms.

As the Transition Manager, Rick's responsibilities included:

Project scope:

- **Managed operational transition activities for Nature's Bounty ITO, a large and complex IT system project**
- **Led a team of over 200 personnel to transition all client infrastructure and application services, leveraging ITIL and PMI project management principles and standards, and reduced the initial transition duration by two months which saved the client carrying costs from the existing/incumbent vendor**
- Implemented new operational processes, rationalized all operating assets, and reduced duplicative tools and software costs resulting in an overall client efficiency gain of 30% in the first year from the client's hybrid operating environment (that included vendor and internal personnel)
- Improved client service hour coverage across all services to full 24/7 and established a rapid onboarding capability for service growth with comprehensive documentation of existing support environments, architecture designs, and training plans
- Managed transition activities for mixed-support environment, transitioning from in-house and incumbent contractors
- Delivered a rapid transition within two months for critical services, mitigating personnel departure and impact to peak year-end activity
- Developed, delivered, and maintained, and the Transition Plan that included transition activities, cross-team responsibilities assignment matrix (RACI), integrated project schedule, training and change management approach

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

- Led overall transition of remaining services within 3.5 months with zero production disruption and with 30% improvements on ticket resolution over the first month of service; minimized impact to end users and business operations during transition
- Assisted client, project sponsors, and program partners in understanding transition-in activities, timelines, and impacts to other initiatives, releases, and tasks
- Identified and communicated with internal and external stakeholders on transition activities as needed

Collaboration:

- Worked collaboratively with Nature's Bounty personnel and incumbent contractors to accomplish a smooth transition, including the development of an integrated/cross-team responsibilities assignment matrix and integrated project schedule
- Worked closely with the Nature's Bounty Transition Manager to plan, manage, and execute transition activities to support alignment across transition teams
- Managed the project status reporting and communications processes for the transition, including leading daily, weekly, and monthly meeting series with Nature's Bounty executives, incumbent contractor's executives, and internal and external stakeholders to discuss the plan for transition activities, project timelines, progress of transition activities, project risks, and impacts to operations
- Worked with the Nature's Bounty's Director of Project Management Office (PMO) to close out transition activities

Total Duration of all Projects cited to meet the MQ:**2 years, 5 months**

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: OhioHealth

Contact Name: [REDACTED]

Project Name: OhioHealth IT Outsourcing (ITO) project

Company Name: [REDACTED]

Time Period: (Month, Day, Year – Month, Day, Year)

March 1, 2022 – January 3, 2023

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Transition Manager

Description of relevant experience:

The OhioHealth project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

1. Integrates with at least two applications, one of which is a COTS: The OhioHealth solution integrates with:

- COTS applications including Python, Selenium, Blue Prism, Workday, ServiceNow, and Epic EMR.
- Accenture proprietary applications including myWizard and an anonymized master patient index.

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

- A patient intervention engine – an application that manages evidence-based treatment protocols for clinical care plans and monitors workflows for patient populations.
 - A cohort manager engine – an application that translates laymen's terms to clinical codes across multiple domains).
2. Interfaces with at least five external systems, at least one of which is real-time: OhioHealth interfaces with county health systems, local health departments, and pharmacies which are real time. Other interfaces include OhioHealth Research & Innovation Institute, the University of Texas MD Anderson Cancer Center, the Southeastern Ohio Regional Medical Center (a member of the Guernsey Health System (GHS), the Ohio State University Wexner Medical Center, medical laboratories, and Ohio Department of Health.
 3. Is accessed by at least 1,000 users at multiple locations: The OhioHealth solution is accessed by 35,000 associates, physicians, and volunteers at health services locations in 47 Ohio counties: 12 hospitals, 200 ambulatory sites, and hospice, home health locations.
 4. Has a contract value of at least \$10,000,000 dollars: The solution contract value is \$209 million.
 5. Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The OhioHealth solution includes a user-facing, multi-tiered, web-based portal application and accompanying mobile application that supports Android and Apple iOS platforms. Additionally, functionalities such as appointment scheduling, bill pay, Epic myChart, and other services are available.

As the Transition Manager, Rick's responsibilities included:

Project scope:

- **Managed operational transition activities on OhioHealth, a large and complex IT system in the healthcare industry**
- **Managed all infrastructure transition-in activities to deliver a successful transition of infrastructure, applications, security, and IT services for clinical staff, 12 hospital locations, Levels 1–3 support and shared Level 4 support for engineering and design. The transition was successfully completed on time.**
- Led a global transition team of over 700 personnel, utilizing PMI, ITIL, and SAFe program management principles
- **Managed the rapid service transition to mitigate 180+ client resource attrition with capacity staffing enabled and onboarded into operations within one month of Transition start**
- Enabled client organizational change by leading a comprehensive Change Management program inclusive of internal/external communications, transformation measurements, surveys, and change champion teams, and supported the OhioHealth client in understanding the scope and schedule of end-to-end transition activities and the related organization change management plans
- Established client training academy for retained and impacted team members with mapped learnings aligned to new roles and market relevant skills
- Developed, delivered, and maintains an integrated master schedule/work plan for the full project scope, which included transition plans for infrastructure, applications, security, and automation

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

- Created a comprehensive risk management and service continuity plan to comply with attrition impacts, business criticality and OhioHealth's zero outage transition requirements
- Managed project risks and developed mitigation plans to minimize potential impact to end users and business operations during transition

Collaboration:

- Worked collaboratively with OhioHealth's existing IT services and hospital personnel to accomplish a smooth transition of all OhioHealth infrastructure components, including with the incumbent contractor to align on the roles and responsibilities, activities, and schedule for transitioning services. Also supported the OhioHealth client to manage staff transitions for OhioHealth's future organizational model.
- Collaborated with the OhioHealth transition manager to implement and manage a comprehensive project transition office and organizational change management team to manage transition activities and related communications and change management activities.
- Worked closely with the OhioHealth transition manager to plan, manage, execute, and close out transition activities and support alignment across transition teams.
- Led daily, weekly, and monthly meetings with OhioHealth executives and internal and external stakeholders to discuss the progress of transition activities

Project #2	Contact #2
Company Name: [REDACTED]	Contact Name: [REDACTED] [REDACTED]
Project Name: IT systems transition	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) April 1, 2019 – February 28, 2020	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Transition Manager	

Description of relevant experience:

The IT system transition project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- 1. Integrates with at least two applications, one of which is a COTS:** The transition of IT services for the client involved the support of all applications and underlying technology, including the integration with SAP HANA, a COTS enterprise resource planning (ERP) platform, and the retail point-of-sale system.
- 2. Interfaces with at least five external systems, at least one of which is real-time:** The IT services interface with several external systems, including affiliate systems, crude oil fields, manufacturing, surveillance, asset management, pipeline operations, microseismic monitoring

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

systems, environmental, finance, crane operation safety, supply chain, and the Refinery Optimization Center (ROC), which operates in real-time.

3. **Is accessed by at least 1,000 users at multiple locations:** The solution delivered is accessed by over 8,000 users daily via point of sale (POS) terminals across 8,000 U.S. retail locations.
4. **Has a contract value of at least \$10,000,000 dollars:** The contract value is greater than \$200,000,000.
5. **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The client solution features multi-tiered processing, including a user-facing front end. For example, refinery operators use handheld devices to transmit equipment surveillance data to the ROC which collects and analyzes the incoming data to confirm proper operations. On the retail side, POS terminals are optimized for multiple user interface platforms.

As the Transition Manager, Rick's responsibilities included:

Project scope:

- Managed all operational transition activities to successfully transition all infrastructure and application services for the client's large and complex IT system
- Led the multi-vendor transition team of over 500 personnel, leveraging Azure DevOps for "single pane of glass" transition planning, monitoring, and execution aggregating all data and providing guided course corrections as needed.
- Established centralized IT onboarding across client subsidiary business units reducing technology diversity, increasing operational efficiency, and simplifying ongoing operations
- Enabled new client business continuity capability across multiple Accenture delivery centers with service failover procedures that were fully developed and tested for the transition
- Created a comprehensive risk management, change management, and service continuity plan to comply with business criticality and the client's zero outage transition requirements and manage risks that may impact end users and business operations during the transition
- Developed and delivered training plan for the client and the client's contractor personnel
- Created and implemented simultaneously 17 unique transition plans—one for the centralized core IT organization and 16 individual transition plans, one per for each business unit, which minimized impacts to end users and business operations during transition-in, service integration, and the end state
- Performed transition activities simultaneously alongside service integration activities

Collaboration:

- Worked collaboratively with client and client's contractor personnel to transition from a capacity services model to a managed services model, including leading joint planning sessions to align on roles and responsibilities, transition activities, integrated project schedule for the transition project

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

- Worked closely with the client's transition managers to plan, manage, and execute transition activities and 100 applications across one centralized core IT organization and 16 individual business units, including the development of standardized processes for operations
- Managed the project status reporting and communications processes for the transition, including leading daily, weekly, and monthly meeting series with client executives and internal and external stakeholders to discuss the plan for transition-in activities, project timelines, progress of transition activities, project risks, and impacts to operations
- Worked with the client's central IT team's transition manager and 16 business unit transition managers to close out transition activities

Project #3	Contact #3
Company Name: The Nature's Bounty Company	Contact Name: [REDACTED]
Project Name: IT Outsourcing	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) August 1, 2017 – March 31, 2018	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Transition Manager	

Description of relevant experience:

The Nature's Bounty IT Outsourcing project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- 1. Integrates with at least two applications, one of which is a COTS:** The project included supporting applications and infrastructure from across the organization including the following COTS applications Oracle (Supply Chain, manufacturing, packaging, and product development), Oracle E-Business Suite (research, master data management), IBM AS-400 (warehouse distribution, order-to-cash, customer management, and EOD/EOM financials), Salesforce (CRM market cloud), and NetSuite (cloud business).
- 2. Interfaces with at least five external systems, at least one of which is real-time:** All Nature's Bounty client internal and external interfaces were transitioned including BizTalk payment gateway, .Net legacy websites, Microsoft active directory federation services, Microsoft SSL certification management, Citrix workspace solutions, data, video, and voice services provided by third-party systems. All systems process data in real time.
- 3. Is accessed by at least 1,000 users at multiple locations:** All client internal and external interfaces were transitioned to support with Accenture. Nature's Bounty has 13,000 employees with access to core systems, vendor and supplier systems, data warehouse, and online point of sale (POS) at multiple locations including the headquarters in Ronkonkoma, NY or the manufacturing and warehouse locations in NY, Canada, Spain, and the United Kingdom. The client has 3,000 users on the platforms transitioned to Accenture.
- 4. Has a contract value of at least \$10,000,000 dollars:** The total contract value was approximately \$42,000,000.

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE

5. **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** Transition support included a website for vendors (suppliers and products) and a consumer website (online store) with front-end optimized for multiple user interface platforms.

As the Transition Manager, Rick's responsibilities included:

Project scope:

- **Managed operational transition activities for Nature's Bounty ITO, a large and complex IT system project**
- Led a team of over 200 personnel to transition all client infrastructure and application services, leveraging ITIL and PMI project management principles and standards, and reduced the initial transition duration by two months which saved the client carrying costs from the existing/incumbent vendor
- Implemented new operational processes, rationalized all operating assets, and reduced duplicative tools and software costs resulting in an overall client efficiency gain of 30% in the first year from the client's hybrid operating environment (that included vendor and internal personnel)
- Improved client service hour coverage across all services to full 24/7 and established rapid onboarding capability for service growth with comprehensive documentation of existing support environments, architecture designs, and training plans
- Managed transition activities for mixed-support environment, transitioning from in-house and incumbent contractors
- Delivered a rapid transition within two months for critical services, mitigating personnel departure and impact to peak year-end activity
- Developed, delivered, and maintained, and the Transition Plan that included transition activities, cross-team responsibilities assignment matrix (RACI), integrated project schedule, training and change management approach
- Led overall transition of remaining services within 3.5 months with zero production disruption and with 30% improvements on ticket resolution over the first month of service; minimized impact to end users and business operations during transition
- Assisted client, project sponsors, and program partners in understanding transition-in activities, timelines, and impacts to other initiatives, releases, and tasks
- Identified and communicated with internal and external stakeholders on transition activities as needed

Collaboration:

- Worked collaboratively with Nature's Bounty personnel and incumbent contractors to accomplish a smooth transition, including the development of an integrated/cross-team responsibilities assignment matrix and integrated project schedule
- Worked closely with the Nature's Bounty Transition Manager to plan, manage, and execute transition activities to support alignment across transition teams
- Managed the project status reporting and communications processes for the transition, including leading daily, weekly, and monthly meeting series with Nature's Bounty executives, incumbent contractor's executives, and internal and external stakeholders to discuss the plan for transition activities, project timelines, progress of transition activities, project risks, and impacts to operations
- Worked with the Nature's Bounty's Director of Project Management Office (PMO) to close out transition activities

PART 2 – M&E TRANSITION MANAGER MINIMUM QUALIFICATIONS TABLE**Total Duration of all Projects cited to meet the MQ:****2 years, 5 months**

1.5 M&E INNOVATION LEAD STAFF QUALIFICATIONS

M&E INNOVATION LEAD			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	John Dray		
Position in the Company	Technology Delivery Lead Associate Director	Length of Time in Position	2 years
Project Position & Responsibilities	M&E Innovation Lead Project responsibilities will be as defined in RFP section 13.1.3.6.5		
Skills & Qualifications for Project Position	<p>Skills: John serves in a leadership role working with teams across projects to drive innovation—proactively exploring, identifying, and evaluating technology innovations—and formulating business cases and recommendations to improve infrastructure, applications, and processes. He provides thought leadership and education on emerging technical trends. He coordinates with technical managers and enterprise architects to evaluate and integrate selected innovation technologies. As a strong leader and communicator, John coordinates closely with client and other contractor teams to create an inclusive culture of innovation.</p> <p>Qualifications: John has 17 years of experience working in a leadership capacity on a health and human services or health care project involving large and complex IT systems (MQ ME-S17: Exceeds). He has 12 years of experience working in a technical capacity responsible for evaluating technology improvements and innovations (MQ ME-S18: Exceeds), and 12 years of experience developing and delivering technology proofs of concept or pilot projects (MQ ME-S19: Exceeds). Additionally, John has 21 years of experience supporting the State of California and its citizens. Under his current leadership on the CalSAWS Project, John has worked on innovation efforts through the “Shark Tank” program, resulting in 150 submitted ideas, 10 pitches, six pilots, and three ideas scaled statewide into the CalSAWS Project. This program was recently recognized by the American Public Human Service Association (APHSA) IT Solutions Management for Human Services (ISM) as a 2022 winner for Collaboration Across Boundaries.</p>		
Relevant Experience (Add additional tables as needed)			
Project Title	California Statewide Automated Welfare System (CalSAWS) and State of California Consortium IV (C-IV)		
Position Title	Shared Services Lead (including Innovation Lead)		
Begin Date	02/2010	End Date	Ongoing
		# of Months	155

M&E INNOVATION LEAD				
Scope and Description of Responsibility	<p>Scope: John works with the imaging, contact center, and lobby management teams to drive future innovation and projects that will expand the effectiveness of these solutions to support the California residents and county workers. He further serves as delivery lead and operations lead for Imaging and Contact Center work to expand the solutions to all 58 counties.</p> <p>Responsibility: John manages the day-to-day operations of the imaging and contact center workflows. He provides guidance and direction on the delivery of imaging and contact center expansions, and he oversees a team size of over 100 people across both teams and the Shark Tank program, which formally began in 2021.</p>			
Skills Utilized and Experience Attained	<p>Skills Utilized: John is skilled in the Microsoft Office suite and cloud architecture. As a certified AWS Cloud Practitioner, he has a vast understanding of AWS cloud infrastructure and how it functions in the CalSAWS ecosystem. Through his experience, John has established a strong understanding of budgeting and financials, client eligibility workflow, and the business processes of the CalSAWS counties. One of John's strengths is his ability to solve business problems.</p> <p>Experience Attained: Through his work on the CalSAWS Project—and particularly in his innovation responsibilities—John has attained a wealth of experience in conducting proofs of concept (POCs) and expanding them into production. He has led and developed many POCs, including solutions using visual interactive voice response (VIVR), predictive handling, voice authentication, lobby kiosks, voice robots, text messaging notifications, and more.</p>			
Project Title	Consortium IV (C-IV)			
Position Title	Multiple roles: Tech Services Lead, Tech Support Lead, Development Tools Specialist/Wide Area Network Administrator			
Begin Date	11/2001	End Date	01/2010	# of Months
Scope and Description of Responsibility	<p>Scope: John provided technical support and leadership for the C-IV Project's Technical Support Team. He managed the Windows infrastructure and data center components for this team. John was also responsible for managing the budget and forecasting for the project's hardware, software, and telecommunications wide area network (WAN) solution.</p> <p>Responsibility: John led and managed the tech support team and its daily operations. He managed special projects to upgrade existing key infrastructure and software. He also managed the project's Microsoft Windows infrastructure, including Windows domains, Exchange email services, file and print services, and group policies for managing server, laptop, and desktop infrastructure. In addition, he managed the hardware and software procurement team and its \$18 million annual budget.</p>			
Skills Utilized and Experience Attained	<p>Skills Utilized: John used his extensive knowledge as a Microsoft Windows administrator to lead the team in managing the Microsoft infrastructure and providing desktop and laptop support. He used his excellent customer service skills to provide outstanding service to the project teams and client staff.</p>			

M&E INNOVATION LEAD			
	Experience Attained: In these roles, John gained experience as a Microsoft Exchange administrator. He developed extensive knowledge of the hardware and software procurement process and gained considerable experience managing large and complex budgets and forecasting for hardware and software. John has improved and expanded his leadership capabilities and knowledge across these roles and projects, with increasing responsibility, experience, and contributions over time. John developed a strong foundation and continuous improvement mindset to share innovation information, suggestions, and ideas to possible innovation solutions.		
Education (add rows as needed)			
Years	Course of Study	School	
09/1997–01/1998	Computer Science	Santa Rosa Junior College	
09/1996–05/1997	Computer Science	Sonoma State University	
Professional Certifications or Designations (add rows as needed)			
Certification or Designation	Organization	Dates	
Cloud Practitioner	Amazon Web Services	08/2022–08/2025 Validation #: XMFFK11KY11EQXKD	
Project Management Professional	Project Management Institute	04/2017–04/2023 PMP #:2034457	

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE		
Minimum Qualification ME-S17	A minimum of five (5) years of experience working in a leadership capacity on a health and human or health care Project involving large and complex IT systems.	
Project #1	Contact #1	
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]	
Project Name: CalSAWS Project	Company Name: [REDACTED]	
Time Period: (Month, Day, Year – Month, Day, Year) February 1, 2010 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: Shared Services Lead (including Innovation Lead)		

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

Contact #2
Contact Name: [REDACTED]
Company Name: [REDACTED]
Phone Number: [REDACTED]
Email: [REDACTED]

Description of relevant experience:

The CalSAWS Project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- Integrates with at least two applications, one of which is a COTS:** The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal).
- Interfaces with at least five external systems, at least one of which is real-time:** The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKS Appraisal Tool (OCAT), and Statewide Client Index all interface in real time.
- Is accessed by at least 1,000 users at multiple locations:** The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500.
- Has a contract value of at least \$10,000,000 dollars:** The CalSAWS contract value is \$1,425,495,842.
- Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets.

As the Shared Services Lead, John's accomplishments and responsibilities include:

- Works in a leadership capacity as the Shared Services Lead supervising 103 resources (at peak) on Contact Center, Imaging, Lobby Management and Innovation Teams at CalSAWS, a health and human Project involving large and complex IT systems**
- Works closely with the Consortium and other CalSAWS contractors to provide expertise and leadership assessing and recommending technology innovations to support Consortium and county business operations**
- Explores, identifies, and evaluates technology innovations proactively, formulates a business case, and makes recommendations for potential updates to infrastructure, application architecture, and applications**
- Works in a technical capacity having productive conversations with the technical manager and enterprise architect to evaluate emerging technologies and integration of selected innovation technologies into the CalSAWS platform**

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

- Develops innovation proposals to include detailed work descriptions and price information
- Provides thought leadership and education to the Consortium regarding emerging technical trends and value proposition impacts to CalSAWS business operations.
- Communicates regularly with the Consortium to share innovation information, suggestions, and ideas and elicits input to possible innovation solutions

Contact Center Team

- Managing a 60-person team for a statewide roll out of the AWS Connect contact center solution.
- Engages weekly with the Executive Director and Technical & Operations Director to discuss risks, status, and upcoming project milestones.
- Led the rollout of AWS Connect Contact Center solution across the 39 C-IV counties starting in April 2021. Due to the successful roll-out we are expanding this solution to include all 58 counties. This consisted of migrating 1,200 agents from an on-premises Cisco Application over to Connect.
- Managing a 10 person Contact Center operations team supporting 1,200 county agents across 14 tenant Contact Center Tenants and shared IVR for 25 other counties all using a Amazon hosted AWS Connect IVR solution, custom built to support CalSAWS Contact Center business processes.

Imaging Team

- Managed a 21-person 100,000 hour effort to migrate from Hyland on-premise Imaging solution to the Hyland cloud based Imaging Solution starting in January 2020. This included the migration of ~1 billion pages of documents into the cloud along with updating the CalSAWS application to meet the requirements of our counties with minimal disruption to workflows.
- Engages weekly with the Executive Director, Technical & Operations Director, and Hyland Executive Leadership to discuss risks, status, upcoming project milestones.
- Engages weekly with Hyland Executive Leadership team including Hyland VP of Services to discuss issues, risks, and status.
- Coordinates heavily with the Hyland Contractor and Hyland Executive team to address Hyland system defects and propose enhancements to support the CalSAWS business process as part of a preferred customer relationship.
- Managing a 7-person Imaging Operations team supporting 30,000 county users using the Cloud-based Hyland Imaging solution.

Lobby Management

- Managed the Lobby Management operations team (January 2011 – April 2020) providing excellent customer service for the counties for a customer-built Lobby Management application including lobby kiosks, tablets (FACT), Lobby Monitors.
- For a feature requested by San Bernardino County, worked closely with the County to gather requirements and developed a custom solution that was centered around the county business processes and further enhanced Reception handling to ensure efficient operations and customer service.
- Managed the deployment of a combine over 150 Lobby Kiosks and Tablets across various counties to support Reception operations.

Innovation Team

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

- Managing a 5-person team overseeing the award winning CalSAWS Shark Tank Program which started in early 2021.
- Oversees the management of process improvements, review of roughly 100 ideas submitted each quarter
- Provides coaching and direction to each of the 5 teams selected to present each quarter to the Consortium Leadership and County Directors.
- Manages the teams through Proof of Concepts and deployments, ensuring all teams measured their results in an objective-results oriented manner
- Implements innovation proofs of concept (POC) or pilots, to validate the proposed approach and business benefit
- Develops and delivers presentations to executive and management levels of the Consortium and County regarding proposed innovations
- Coordinates, facilitates, and manages innovation-related planning and evaluation meetings

Total Duration of all Projects cited to meet the MQ:**12 years, 11 months****Minimum Qualification ME-S18**

A minimum of five (5) years of experience working in a technical capacity responsible for evaluating technology improvements and innovations.

Project #1

Company Name: CalSAWS Consortium

Project Name: CalSAWS Project

Time Period: (Month, Day, Year – Month, Day, Year)
February 1, 2010 – January 4, 2023 (Ongoing)

Percentage of Time: 100%

Staff Role: Shared Services Lead (including Innovation Lead)

Contact #1

Contact Name: [REDACTED]

Company Name: [REDACTED]

Phone Number: [REDACTED]

Email: [REDACTED]

Contact #2

Contact Name: [REDACTED]

Company Name: [REDACTED]

Phone Number: [REDACTED]

Email: [REDACTED]

Description of relevant experience:

As the Shared Services Lead, John's accomplishments and responsibilities include:

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

- Explores, identifies, and evaluates technology innovations proactively, formulates a business case, and makes recommendations for potential updates to infrastructure, application architecture, and applications
- Works in a technical capacity having productive conversations with the technical manager and enterprise architect to evaluate emerging technologies and integration of selected innovation technologies into the CalSAWS platform
- Works in a leadership capacity as the Shared Services Lead supervising 103 resources (at peak) on Contact Center, Imaging, Lobby Management and Innovation Teams at CalSAWS, a health and human Project involving large and complex IT systems
- Works closely with the Consortium and other CalSAWS contractors to provide expertise and leadership assessing and recommending technology innovations to support Consortium and county business operations
- Develops innovation proposals to include detailed work descriptions and price information
- Provides thought leadership and education to the Consortium regarding emerging technical trends and value proposition impacts to CalSAWS business operations.
- Communicates regularly with the Consortium to share innovation information, suggestions, and ideas and elicits input to possible innovation solutions

Contact Center Team

- Managing a 60-person team for a statewide roll out of the AWS Connect contact center solution.
- Engages weekly with the Executive Director and Technical & Operations Director to discuss risks, status, and upcoming project milestones.
- Led the rollout of AWS Connect Contact Center solution across our 39 C-IV counties starting in April 2021. Due to the successful roll-out we are expanding this solution to include all 58 counties. This consisted of migrating 1,200 agents from an on-premises Cisco Application over to Connect.
- Managing a 10 person Contact Center operations team supporting 1,200 county agents across 14 tenant Contact Center Tenants and shared IVR for 25 other counties all using a Amazon hosted AWS Connect IVR solution, custom built to support CalSAWS Contact Center business processes.

Imaging Team

- Managed a 21-person 100,000 hour effort to migrate from Hyland on-premise Imaging solution to the Hyland cloud based Imaging Solution starting in January 2020. This included the migration of ~1 billion pages of documents into the cloud along with updating the CalSAWS application to meet the requirements of our counties with minimal disruption to workflows.
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PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE**Lobby Management**

- Managed the Lobby Management operations team (January 2011 – April 2020) providing excellent customer service for the counties for a customer-built Lobby Management application including lobby kiosks, tablets (FACT), Lobby Monitors.
- For a feature requested by San Bernardino County, worked closely with the County to gather requirements and developed a custom solution that was centered around the county business processes and further enhanced Reception handling to ensure efficient operations and customer service.
- Managed the deployment of a combine over 150 Lobby Kiosks and Tablets across various counties to support Reception operations.

Innovation Team

- Managing a 5-person team overseeing the award winning CalSAWS Shark Tank Program which started in early 2021.
- Oversees the management of process improvements, review of roughly 100 ideas submitted each quarter
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- Coordinates, facilitates, and manages innovation-related planning and evaluation meetings

Total Duration of all Projects cited to meet the MQ:**12 years, 11 months**Minimum
Qualification ME-
S19

A minimum of two (2) years of experience developing and delivering technology Proofs of Concept or Pilot Projects.

Project #1**Contact #1**

Company Name: CalSAWS Consortium

Contact Name: [REDACTED]

Project Name: CalSAWS Project

Company Name: [REDACTED]

Time Period: (Month, Day, Year – Month, Day, Year)

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Shared Services Lead (including Innovation Lead)

Contact #2

Contact Name: [REDACTED]

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

	Company Name: [REDACTED]
	Phone Number: [REDACTED]
	Email: [REDACTED]

*Description of relevant experience:***For the CalsAWS Project, John evaluates technology improvements and innovations, including the following completed POCs:**

- **Visual IVR solution** for San Bernardino County (May 2015 – Dec 2015): Turned the traditional audio IVR solution into an application to serve the customers via a web page prior to escalating to a phone call
- **Predictive handling solution** for San Bernardino County (Feb 2016 – Dec 2016): Created a machine learning algorithm that used the customer's phone number to look up their case information and determine why someone was calling into the contact center
- **Voice authentication** for San Bernardino County and expanded to all counties (Oct 2015 – Jan 2016): Created a voice authentication solution in the contact center
- **Lobby kiosks** for San Bernardino County and expanded to all counties (Jan 2011 – Aug 2011): Deployed a custom kiosk and application which enabled customers to scan in documents and check in to the lobby
- **Lobby tablets** for San Bernardino County and expanded to all counties (April 2014 – Dec 2014): Created a custom tablet and application for SB which enabled workers to check their customers into the lobby efficiently
- **Lobby Monitors** for CalsAWS (Jan 2016 – Aug 2016): Created a custom solution for calling customers to the window while they waited in the lobby, along with reporting metrics and capabilities to manage the lobby effectively
- **Voice robot solution** for San Bernardino County and expanded to all counties (Mar 2021 – Sep 2021): Created a "bot" that authenticates customers, pushes custom case information once authenticated, and triages why the customer is calling into the contact center
- **Text messaging solution** for CalsAWS (Jun 2014 – Jan 2015): Created a text messaging solution to notify customers of key activities that can impact their case
- **Expanded text messaging solution** for San Bernardino County and expanded to all counties (Feb 2017 – Dec 2017): Expanded the use cases already implemented for text messaging to improve our text messaging campaign and reduce churn
- **Electronic signature solution** for CalsAWS (Mar 2017 – Dec 2017): Created a solution to capture the customer's signature digitally through text messaging, IVR pin, and email
- **Telephonic signature solution** for CalsAWS (Jan 2021 – May 2022): Expanded the electronic signature solution to include capturing a recording of the customer's attestation
- **Marketing and communications** for San Bernardino County (Nov 2021 – Mar 2022): Developed a marketing and communications solution to improve the opt-in rates of customers for the text messaging solution

As the Shared Services Lead, John's accomplishments and responsibilities include:

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

- Works in a leadership capacity as the Shared Services Lead supervising 103 resources (at peak) on Contact Center, Imaging, Lobby Management and Innovation Teams at CalsAWS, a health and human Project involving large and complex IT systems
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- Works in a technical capacity having productive conversations with the technical manager and enterprise architect to evaluate emerging technologies and integration of selected innovation technologies into the CalsAWS platform
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Imaging Team

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- Engages weekly with Hyland Executive Leadership team including Hyland VP of Services to discuss issues, risks, and status.
- Coordinates heavily with the Hyland Contractor and Hyland Executive team to address Hyland system defects and propose enhancements to support the CalsAWS business process as part of a preferred customer relationship.
- Managing a 7-person Imaging Operations team supporting 30,000 county users using the Cloud-based Hyland Imaging solution.

PART 2 – M&E INNOVATION LEAD MINIMUM QUALIFICATIONS TABLE

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- For a feature requested by San Bernardino County, worked closely with the County to gather requirements and developed a custom solution that was centered around the county business processes and further enhanced Reception handling to ensure efficient operations and customer service.
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Innovation Team

- Managing a 5-person team overseeing the award winning CalSAWS Shark Tank Program which started in early 2021.
- Oversees the management of process improvements, review of roughly 100 ideas submitted each quarter
- Provides coaching and direction to each of the 5 teams selected to present each quarter to the Consortium Leadership and County Directors.
- Manages the teams through Proof of Concepts and deployments, ensuring all teams measured their results in an objective-results oriented manner
- Implements innovation proofs of concept (POC) or pilots, to validate the proposed approach and business benefit
- Develops and delivers presentations to executive and management levels of the Consortium and County regarding proposed innovations
- Coordinates, facilitates, and manages innovation-related planning and evaluation meetings

Total Duration of all Projects cited to meet the MQ:

12 years, 11 months

1.6 M&E ENTERPRISE ARCHITECT STAFF QUALIFICATIONS

M&E ENTERPRISE ARCHITECT			
PART 1 – RÉSUMÉ			
Contractor	Accenture LLP		
Candidate Name	Luz Esparza		
Position in the Company	Managing Director	Length of Time in Position	2 years
Project Position & Responsibilities	M&E Enterprise Architect Luz meets the requirements as defined in RFP section 13.1.3.6.6.		
Skills & Qualifications for Project Position	<p>Skills: Luz has significant skills working in M&E enterprise architecture and exceeds the mandatory requirements. She currently works with the technical manager, application manager, and innovation lead to collectively architect a scalable, adaptable enterprise solution that is in synch with clients' changing business needs and application evolution. At a high level, she guides the Consortium on enterprise architecture planning and supports alignment with the Consortium's strategic vision. Luz has master-level skills in Amazon Web Services (AWS) architecture, cloud enterprise architecture, and cloud technology architecture. She evaluates cloud application requirements and makes architectural recommendations for implementation, deployment, and provisioning applications on the AWS platform. She assists with developing policy, standards, and guidelines that direct the selection, development, implementation, and use of IT within the organization. Additionally, Luz has expert skills in infrastructure architecture, design, strategy, blueprinting, and roadmap definitions along with technology skills of web and application servers, cloud, customized off-the-shelf (COTS) software, service-oriented architecture (SOA), data architecture, and desktop clients/servers. Combined with her soft skills in communication, problem-solving, relationships, and teamwork, Luz has led technical teams successfully throughout the LEADER Replacement System (LRS) and CalSAWS projects.</p> <p>Qualifications: Luz is a certified delivery lead and senior technology architect in Accenture Cloud First. She has 18 years of experience delivering custom application projects from managing the delivery of the technical architecture to development and operations. She is a certified AWS cloud practitioner and engages in AWS community and leadership teams to promote successful AWS project deliveries, contributing to the Accenture AWS community assets and tools. Luz has delivered cloud native applications on various cloud platforms, including AWS for five years (Meets ME-S20). She has 10 years of experience architecting and building high-performance systems and/or in architecting and building enterprise-scale, distributed systems on projects involving large and complex IT systems. CalSAWS and LRS are human services systems and programs (Exceeds ME-S21). For more than five years in the past 10 years, Luz has used her advanced technical expertise in six of the five minimum technical/architecture areas: web and application servers, cloud, COTS software, SOA, data</p>		

M&E ENTERPRISE ARCHITECT				
	architecture, and desktop clients/servers. (Exceeds ME-S22). She currently holds and will maintain an AWS Certified Solutions Architect Certification for the duration of the contract (Meets ME-S23).			
Relevant Experience (Add additional tables as needed)				
Project Title	CalSAWS			
Position Title	Enterprise Architect (Cloud Migration)			
Begin Date	3/2019	End Date	Ongoing	# of Months 46
Scope and Description of Responsibility	Scope: Luz provided the technical leadership and execution of the enhancements associated with migrating the LRS to an AWS cloud-based architecture to support 58 California counties and promote seamless integration between the architectures that interact and/or interface with CalSAWS. To prepare the LRS migration to the cloud, Luz readied the physical environment for migration by verifying data and security requirements were met, enabling tools, and supporting platform connectivity. Responsibility: Luz manages the technical design, development, and implementation (CalSAWS DD&I) activities as well as the operational and technical concerns related to system performance. Also, she manages the maintenance and operations associated with supporting two separate applications and the associated services that include imaging, AWS Connect (customer service center), lobby management, public-facing portals, and local technical support (managed workstations).			
Skills Utilized and Experience Attained	Skills Utilized: Luz uses Accenture methodologies, reusable assets, and vast project knowledge to develop and deliver cloud strategies and solutions. She creates thorough documentation and concise reports while helping improve on existing methods and procedures to address challenges. Experience Attained: Luz provides high-level guidance and direction to the Consortium on enterprise and cloud architecture, public cloud service providers (AWS), and core IT concepts. She leads technical conversations at the executive level, and she uses her understanding and experience managing and delivering cloud programs across the project life cycle.			
Project Title	LEADER Replacement System (LRS)			
Position Title	Enterprise Architect (Technology)			
Begin Date	12/2012	End Date	3/2019	# of Months 66 total, adjusted for 8 month gap
Scope and Description of Responsibility	Scope: The LRS application technical infrastructure featured multiple layers. Luz managed the LRS application and oversight of the technical layer infrastructure to make sure it was secure and available in accordance with Los Angeles County's performance requirements. Responsibility: Luz managed the technical teams responsible for infrastructure and architecture. She led the Design/Build/Test of the technical reference architecture, managed the installation of tools, and supported the			

M&E ENTERPRISE ARCHITECT			
	infrastructure. She also managed all of the integrated development environment and performance testing and tuning. She validated that the production system met SLAs and developed the technical deliverables required for the Design and Implementation phase.		
Skills Utilized and Experience Attained	<p>Skills Utilized: Solution planning, collaborating with stakeholders, and relationship building are some of the skills Luz used when developing, implementing, or maintaining applications and platforms. Her strong oral and written communications skills led to and facilitated completely transparent relationships with technical teams, stakeholders, contractors, and vendors.</p> <p>Experience Attained: Luz led, managed, and supported all the integrated development environment. She managed performance testing and tuning and supported the production system to verify compliance with SLAs. During the Design and Implementation phase, Luz developed thorough documentation alongside her technical deliverables.</p>		
Education (add rows as needed)			
Years	Course of Study	School	
08/1994 – 05/1998	B.S., Electrical Engineering	Stanford University	
Professional Certifications or Designations (add rows as needed)			
Certification or Designation	Organization	Dates	
Cloud Practitioner	AWS	February 20, 2021– February 20, 2024 Validation Number: MT0RLXVJDN1QQB9L	
Cloud Solutions Architect	AWS	December 2, 2022 – December 2, 2025 Validation Number: T3R2HK7C5BBEQCW5	

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE	
Minimum Qualification ME-S20	A minimum of five (5) years of experience within the past ten (10) years as an Enterprise Architect on Projects involving large and complex IT systems.
Project #1	Contact #1
Company Name: CalSAWS Consortium	Contact Name: [REDACTED]
Project Name: CalSAWS	Company Name: [REDACTED]
Time Period: March 4, 2019 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Enterprise Architect (Cloud Migration)

Description of relevant experience: In the past four years on CalSAWS, a large and complex IT project as defined in the following table, Luz has provided technical leadership and has executed the enhancements associated with migrating the LRS to a single platform (cloud). She continues to provide seamless integration between the architectures that interact and/or interface with CalSAWS. She prepared the physical environment for migration by verifying data and security requirements were met, enabling tools, and supporting platform connectivity. She manages the technical CalSAWS DD&I activities, the operational and technical concerns related to system performance, and the maintenance and operations associated with supporting separate applications and the associated services that include imaging, AWS Connect (customer service center), lobby management, public-facing portals, and local technical support (managed workstations) as part of the CalSAWS project operational goals.

The CalSAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- **Integrates with at least two applications, one of which is a COTS:** The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal).
- **Interfaces with at least five external systems, at least one of which is real-time:** The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKS Appraisal Tool (OCAT), and Statewide Client Index all interface in real time.
- **Is accessed by at least 1,000 users at multiple locations:** The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500.
- **Has a contract value of at least \$10,000,000 dollars:** The CalSAWS contract value is \$1,425,495,842.
- **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The CalSAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets.

Scope of Services:

Luz functions at the expert-level enterprise architect performing analytical work in the design and development of architecture cloud strategy, oversees the migration of technical infrastructure and technology, and provides the architectural direction and guidance to the team. She works with the stakeholders to plan and oversee of application evolution efforts.

As the Enterprise Architect for the CalSAWS Project, Luz' responsibilities include:

- Serves as the Enterprise Architect on the CalSAWS Project, which is a large and complex IT system in a health and human services project

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Manages and leads the day-to-day activities of over 50 personnel to design, development, implement, and maintain solutions for the CalsAWS system's technical infrastructure, technology, and enterprise services
- Collaborates with the technical, application, and innovation leads to provide enterprise enhancements that are scalable, adaptable, and in synchronization with changing business needs
- Provides high-level guidance and direction to the Consortium on enterprise architecture planning, ensuring that new projects fit within the Consortium's overall strategic vision
- Conducts research and provides recommendations on appropriate technologies to address CalsAWS' needs and improve efficiency
- Managed and led the execution of a proof of concept (POC) to confirm viability of migrating the LRS/CalsAWS eligibility application and supporting services to AWS cloud
- Based on the outcomes of the POC, managed and led the delivery of architecture changes to support the migration and implemented cloud-native services, including the introduction of event streaming architecture to support moving the data processing from batch processing to real-time where applicable
- Successfully managed the planning, development, and delivery of the activities for the LRS system's migration from on-premises data centers to an AWS-cloud based architecture as part of the CalsAWS DD&I Project's cloud enablement scope. The migration was completed on time.
- Led the design, development, and implementation of an AWS-native solution to support the CalsAWS system's correspondence document management
- Oversaw and managed the successful design, development, implementation, maintenance and operations of an enterprise Identity Access Management (IAM) solution (based on the ForgeRock platform) that replaced the legacy solution and established an enterprise front door to the CalsAWS services
- Oversaw and managed for the successful design, development, implementation of the enterprise data lake and purpose-built data sets utilizing AWS cloud services to provide an enterprise solution for reporting and analytics (Qlik reports)
- Developed an architecture strategy and high-level roadmap to move the CalsAWS application from the existing monolithic architecture to a modular architecture
- Evaluates AWS cloud application requirements to make architectural recommendations for implementation, deployment, and provisioning applications on AWS
- Assists with the development of policies, standards, and guidelines of IT within the organization
- Regularly oversees, reviews, and approves application architecture documents and standards

Project #2	Contact #2
Company Name: LA County Department of Public Social Services (DPSS)	Contact Name: [REDACTED]
Project Name: LEADER Replacement System (LRS)	Company Name: [REDACTED]
Time Period: December 1, 2012 – March 1, 2016; November 1, 2016 – March 3, 2019	Phone Number: [REDACTED]

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE	
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Enterprise Architect (Technology)	
<p>Description of relevant experience: Luz spent four years on LRS, another large and complex IT project as defined in the following table. Working with the LRS team, Luz worked with DPSS on enterprise and cloud architecture, public cloud service providers (AWS), and core IT concepts while preparing LRS for migration to cloud. She prepared the physical environment for migration by making sure data and security requirements were met, enabling tools, and supporting platform connectivity. She provided guidance through executive-level technical conversations, and she used her understanding and experience managing and delivering cloud programs across the project life cycle.</p> <p>The LRS project meets the definition of “large and complex IT system,” based on the following criteria defined in the RFP:</p> <ul style="list-style-type: none"> • Integrates with at least two applications, one of which is a COTS: The LRS solution integrated with a member self-service portal, IVR, EDMS (document imaging), call center application, mobile apps, and a real-time lobby check-in. LRS and ancillary services used 60-plus COTS software components as part of the overall solution including Adobe, Cisco, IBM, Informatica, Oracle, Pitney Bowes, SAP, and ServiceNow. • Interfaces with at least five external systems, at least one of which is real-time: The LRS solution interfaced with several real-time external systems including MEDS, IEVS, DMS/ELP, CalWIN, Department of Children and Family Services (DCFS), Child Support, Department of Public Social Services (DPSS), and CalHEERS (near real time). • Is accessed by at least 1,000 users at multiple locations: The LRS solution was accessed by 13,000 Los Angeles County users at 130 office locations. • Has a contract value of at least \$10,000,000 dollars: The solution contract value was \$1,054,145,353 (initial term, amended). • Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms: The LRS solution included multi-tiered architecture including front-end applications optimized for various user interface platforms. <p>Scope of Services:</p> <p>Luz served as the expert-level technology enterprise architect at LRS performing analytical work in the design and development of architecture strategy, oversaw the migration of technical infrastructure and technology, and provided the architectural direction and guidance to the team. She worked with the stakeholders to plan and oversee application evolution efforts.</p> <p>As the Enterprise Architect, Luz’ responsibilities included:</p> <ul style="list-style-type: none"> • Served as the enterprise architect on LRS, a large and complex IT system in a health and human services project • Managed and led the day-to-day activities of over 150 personnel to design, development, implement, and maintain solutions for the LRS’ technical infrastructure, technology, and enterprise services • Architected and built high-performance, enterprise-scale, distributed systems for LRS 	

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Analyzed the design and development of LRS architecture strategy, provided oversight for the implementation of technical infrastructure and technology, updated deliverables for SDLC and infrastructure design, and provided the architectural direction and guidance to enterprise-scale performance systems
 - Managed and led the successful buildout of two on-premises data centers (the LRS system's primary and back-up data centers), and working with a sub-contractor to deliver on time
 - Managed and led the design, build, and delivery of the environments required to support development of the LRS application. This included development workspaces, compute allocation, and automated application environment buildout
 - Managed and led the design and implementation of development process and procedures for the LRS project, which included the implementation of a continuous integration/continuous delivery (CI/CD) pipeline for real-time code deployments
 - Managed and led the implementation of the high availability (HA) design and execution of performance test and changes, which resulted in the LRS system exceeding performance requirements/SLAs
 - Provided high-level guidance and direction to the LA County DPSS on enterprise architecture planning, making sure new projects fit within their overall strategic vision
 - Facilitated guidance through monthly meetings with the project director to review activities and introduce new services and technologies
 - Recommended an architecture strategy and roadmap to move the LRS application
 - Worked with the LRS architecture board to review and approve analysis and recommendations for a phased architecture and application evolution migration and align with approved budget
 - Worked with the LRS architecture board to align with IT strategy and planning with LRS business goals, making sure projects did not duplicate functionality or diverge from each other or from business and IT strategies
 - Worked with the LRS architecture board to evaluate application requirements and made architectural recommendations for implementation, deployment, and provisioning applications
 - Conducted weekly meetings to:
 - Assist with the development of policies, standards, and guidelines that directed the selection, development, implementation, and use of IT within the organization
 - Provide oversight, review, and approve application architecture documents and standards
 - Managed Infrastructure and Technical teams throughout the Design, Build, and Test phases of the technical reference architecture
 - Managed performance testing and tuning
 - Verified production system met SLAs
 - Worked with the technical manager, application manager, and innovation lead in monthly planning meetings to provide an enterprise solution that was scalable, adaptable, and in synchronization with changing business needs and application evolution
- Collaboration**
- Coordinated with the various contractors through monthly and ad-hoc meetings during the architectural work

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Collaborated with vendors on web, cloud, and server technologies
- Worked with the project director in monthly meetings to plan and oversee implementation of application evolution efforts

Total Duration of all Projects cited to meet the MQ:		9 years, 4 months
Minimum Qualification ME-S21	A minimum of five (5) years of experience within the past ten (10) years in architecting and building high performance systems and/or in architecting and building enterprise-scale, distributed systems on Projects involving large and complex IT systems; a portion of this experience must have been with human services systems and programs.	
Project #1	Contact #1	
Company Name: CalsAWS Consortium	Contact Name: [REDACTED]	
Project Name: CalsAWS	Company Name: [REDACTED]	
Time Period: March 4, 2019 – January 4, 2023 (Ongoing)	Phone Number: [REDACTED]	
Percentage of Time: 100%	Email: [REDACTED]	
Staff Role: Enterprise Architect (Cloud Migration)		

Description of relevant experience: In the past four years on CalSAWS, a large and complex IT project as defined in the following table, Luz has provided technical leadership and executed the enhancements associated with migrating LRS to a single platform (cloud). She continues to provide seamless integration between the architectures that interact and/or interface with CalSAWS. She prepared the physical environment for migration by verifying data and security requirements were met, enabling tools, and supporting platform connectivity. She manages the technical DDI activities, the operational and technical concerns related to system performance, and the maintenance and operations associated with supporting separate applications and the associated services that include imaging, AWS Connect (customer service center), lobby management, public facing portals, and local tech support (managed workstations) as part of the CalSAWS project's operational goals.

The CalSAWS project meets the definition of "large and complex IT system," based on the following criteria defined in the RFP:

- **Integrates with at least two applications, one of which is a COTS:** The CalSAWS solution integrates custom Java code with COTS applications (e.g., Oracle database and middleware products, Informatica Identity Resolution, Pitney Bowes Spectrum, ForgeRock, and IBM Operational Decision Manager). The core eligibility application further integrates with other COTS applications (e.g., Adobe Experience Manager and AWS Connect) and custom applications (e.g., OCAT, Child Care Portal, and BenefitsCal).
- **Interfaces with at least five external systems, at least one of which is real-time:** The CalSAWS solution interfaces and exchanges with 50 external systems. BenefitsCal, CalHEERS, County Master Data Management (MDM), Lobby Monitors, the Online CalWORKs Appraisal Tool (OCAT), and Statewide Client Index all interface in real time.
- **Is accessed by at least 1,000 users at multiple locations:** The CalSAWS solution is accessed by an average of 18,500 daily users across 125 locations. After the CalWIN counties are migrated, the number of CalSAWS users will be approximately 41,500.

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Has a contract value of at least \$10,000,000 dollars: The CalsAWS contract value is \$1,425,495,842.
- **Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The CalsAWS core eligibility application includes a multi-tiered processing architecture, a presentation tier optimized for multiple user interface platforms (e.g., Google Chrome and Microsoft Edge), an application tier, and a data tier. Other components of the system run on other user interface platforms such as kiosks and tablets.

As the Enterprise Architect (Cloud Migration), Luz' responsibilities include:

Project Scope (High-performance, enterprise-scale, distributed systems)

- Serves as the enterprise architect for the cloud migration on CalsAWS, a large and complex IT system in a health and human services project
- Manages and leads the day-to-day activities of over 50 personnel to design, development, implement, and maintain solutions for the CalsAWS system's technical infrastructure, technology, and enterprise services
- Managed and led the execution of a proof of concept (POC) to confirm viability of migrating the LRS/CalsAWS eligibility application and supporting services to AWS cloud
- Based on the outcomes of the POC, managed and led the delivery of architecture changes to support the migration and implemented cloud-native services, including the introduction of event streaming architecture to support moving the data processing from batch processing to real-time where applicable
- Successfully managed the planning, development, and delivery of the activities for the LRS system's migration from on-premises data centers to an AWS-cloud based architecture as part of the CalsAWS DD&I Project's cloud enablement scope. The migration was completed on time
- Led the implementation of the CalsAWS application architecture to continue supporting the availability requirements from on-premises to the cloud architecture
- Managed and led performance test executions to confirm that the updated cloud architecture continued to meet the CalsAWS performance requirements/SLAs
- Led the design, development, and implementation of an AWS-native solution to support the CalsAWS system's correspondence document management
- Oversaw and managed the successful design, development, implementation, maintenance and operations of an enterprise Identity Access Management (IAM) solution (based on the ForgeRock platform) that replaced the legacy solution and established an enterprise front door to the CalsAWS services
- Oversaw and managed for the successful design, development, implementation of the enterprise data lake and purpose-built data sets utilizing AWS cloud services to provide an enterprise solution for reporting and analytics (Qlik reports)
- Architects and builds high-performance, enterprise-scale, distributed systems for CalsAWS
- Analyzes the design and development of architecture strategy
- Provides oversight of the implementation of technical infrastructure and technology, updates deliverables to document changes as processes migrate to cloud architecture, and provides the architectural direction and guidance to enterprise-scale performance systems

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Provides high-level guidance and direction to the Consortium on enterprise architecture planning, making sure new projects fit within the Consortium's overall strategic vision
- Facilitates guidance through monthly meetings with the Consortium to review activities and introduce new services and technologies
- Recommends an architecture and building strategy and roadmap to move the CalsAWS human services application from the existing monolithic architecture to a modular architecture, including the LRS application roadmap (updates, analytics, and service items for Adobe and Apache Kafka event streaming architectures) that was included in the CalsAWS DD&I
- Works with the CalsAWS architecture board to accomplish the following:
- Review and approve analysis and recommendations for a phased architecture and application evolution migration, aligning with the established budget
- Align with IT strategy and planning with CalsAWS business goals, verifying projects do not duplicate functionality or diverge from each other or from business and IT strategies
- Evaluate cloud application requirements and make architectural recommendations for implementation, deployment, and provisioning applications on AWS
- Conducts weekly meetings for the following:
- Assists with the development of policies, standards, and guidelines that direct the selection, development, implementation, and use of IT within the organization
- Oversees, reviews, and approves application architecture documents and standards developed by the Accenture team
- Promotes seamless integration between all architectures that interact and/or interface with CalsAWS
- Conducts research and provide recommendations on appropriate technologies to address CalsAWS' needs and improve efficiency
- Manages Infrastructure and Technical teams throughout the Design, Build, and Test phases of the technical reference architecture
- Manages performance testing and tuning
- Verifies production system meets SLAs
- Works with the technical manager, application manager, and innovation lead in monthly planning meetings to provide an enterprise solution that is scalable, adaptable, and synchronized with changing business needs and application evolution

Collaboration

- Collaborates and coordinates with the various Consortium contractors in performing architectural work during monthly planning meetings
- Meets with the Consortium monthly in scheduled and ad-hoc meetings to plan and oversee implementation of application evolution efforts

Project #2	Contact #2
Company Name: LA County DPSS	Contact Name: [REDACTED]
Project Name: LEADER Replacement System (LRS)	Company Name: [REDACTED]

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

Time Period: December 1, 2012 – March 1, 2016; November 1, 2016 – March 3, 2019

Phone Number [REDACTED]

Percentage of Time: 100%

Email [REDACTED]

Staff Role: Enterprise Architect (Technology)

Description of relevant experience: Luz spent four years on LRS, another large and complex IT project as defined in the following table. Coordinating with the LRS team, Luz worked with the DPSS on enterprise and cloud architecture, public cloud service providers (AWS), and core IT concepts while preparing LRS for migration to the cloud. She prepared the physical environment for migration by verifying data and security requirements were met, enabling tools, and supporting platform connectivity. She provided guidance through executive-level technical conversations, and she used her understanding and experience managing and delivering cloud programs across the project life cycle.

The LRS project meets the definition of “large and complex IT system,” based on the following criteria defined in the RFP:

- Integrates with at least two applications, one of which is a COTS:** The LRS solution integrated with a member self-service portal, IVR, EDMS (document imaging), call center application, mobile apps, and a real-time lobby check-in. LRS and ancillary services used 60-plus COTS software components as part of the overall solution including Adobe, Cisco, IBM, Informatica, Oracle, Pitney Bowes, SAP, and ServiceNow.
- Interfaces with at least five external systems, at least one of which is real-time:** The LRS solution interfaced with several real-time external systems including MEDS, IIEVs, DMS/ELP, CalWIN, Department of Children and Family Services (DCFS), Child Support, Department of Public Social Services (DPSS), and CalHEERS (near real time).
- Is accessed by at least 1,000 users at multiple locations:** The LRS solution was accessed by 13,000 Los Angeles County users at 130 office locations.
- Has a contract value of at least \$10,000,000 dollars:** The solution contract value was \$1,054,145,353 (initial term, amended).
- Includes multi-tiered processing, including a customer or user-facing front-end optimized for multiple user interface platforms:** The LRS solution included multi-tiered architecture including front-end applications optimized for various user interface platforms.

As the Enterprise Architect (Technology), Luz’ responsibilities included:

Project Scope (High-performance, enterprise-scale, distributed systems)

- Served as the enterprise architect (Technology) on LRS, a large and complex IT system in a health and human services project
- Managed and led the day-to-day activities of over 150 personnel to design, development, implement, and maintain solutions for the LRS’ technical infrastructure, technology, and enterprise services
- Architected and built high performance, enterprise-scale, distributed systems for LRS

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Analyzed the design and development of the LRS architecture strategy, provided oversight for the implementation of technical infrastructure and technology, updated deliverables for SDLC and infrastructure design, and provided the architectural direction and guidance to enterprise-scale performance systems. Provided high-level guidance and direction to the LA County DPSS on enterprise architecture planning, making sure new projects fit within their overall strategic vision
- Managed and led the successful buildout of two on-premises data centers (the LRS system's primary and back-up data centers), and working with a sub-contractor to deliver on time
- Managed and led the design and implementation of the LRS disaster recovery solution that achieved the ability to recover down to four (4) hours
- Led the design and implementation of development architecture utilized to support the LRS development team
- Managed and led the design, build, and delivery of the environments required to support development of the LRS application. This included development workspaces, compute allocation, and automated application environment buildout
- Managed and led the design and implementation of development process and procedures for the LRS project, which included the implementation of a continuous integration/continuous delivery (CI/CD) pipeline for real-time code deployments
- Managed and led the implementation of the high availability (HA) design and execution of performance test and changes, which resulted in the LRS system exceeding performance requirements/SLAs
- Led the design, development, and implementation of architecture updates that allowed the LRS application to scale to achieve performance and availability requirements
- Facilitated guidance through monthly meetings with the project director to review activities and introduce new services and technologies
- Recommended an architecture strategy and roadmap to move the LRS application
- Worked with the LRS architecture board to review and approve analysis and recommendations for a phased architecture and application evolution migration and align with approved budget
- Worked with the LRS architecture board to align with IT strategy and planning with LRS business goals, verifying projects did not duplicate functionality or diverge from each other or from business and IT strategies
- Worked with the LRS architecture board to evaluate application requirements and made architectural recommendations for implementation, deployment, and provisioning applications
- Conducted weekly meetings for the following:
 - Assisted with the development of policies, standards, and guidelines that directed the selection, development, implementation, and use of IT within the organization
 - Provided oversight, review, and approve application architecture documents and standards
 - Promoted seamless integration between all architectures that interact and/or interface with LRS
 - Conducted research and provide recommendations on appropriate technologies to address LRS needs and improve efficiency
- Managed Infrastructure and Technical teams throughout the Design, Build, and Test phases of the technical reference architecture
- Managed performance testing and tuning

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Verified production system met SLAs
 - Worked with the technical manager, application manager, and innovation lead in monthly planning meetings to provide an enterprise solution that was scalable, adaptable, and synchronized with changing business needs and application evolution
- Collaboration**
- Coordinated with the various contractors through monthly and ad-hoc meetings during the architectural work
 - Collaborated with vendors on web, cloud, and server technologies
 - Worked with the project director in monthly meetings to plan and oversee implementation of application evolution efforts

Total Duration of all Projects cited to meet the MQ:**9 years, 4 months**

A minimum of five (5) years of experience within the past ten (10) years of advanced technical expertise in at least five (5) of the following technologies and technical/architecture areas:

- Web and Application Servers -
- Cloud
- Customer Relationship Management (CRM)
- Customized Off-the-shelf Software (COTS)
- Service Oriented Architecture (SOA)
- Modeling skills/Unified Modeling Language (UML)
- SharePoint, Data Architecture
- Data Warehousing
- Security/Identity Management
- Mobile
- Desktop/Client Server
- Network solutions

Minimum Qualification ME-S22

Project #1**Contact #1**

Company Name: CalSAWS Consortium

Contact Name: [REDACTED]

Project Name: CalSAWS

Company Name: [REDACTED]

Time Period: March 4, 2019 – January 4, 2023 (Ongoing)

Phone Number: [REDACTED]

Percentage of Time: 100%

Email: [REDACTED]

Staff Role: Enterprise Architect (Cloud Migration)

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

Description of relevant experience: Luz provides high-level guidance and direction to the Consortium on enterprise architecture planning, making sure that new projects fit within the Consortium's overall strategic vision. She aligns with IT strategy and planning with CalsAWS business goals, making sure projects do not duplicate functionality or diverge from each other or from business and IT strategies. Her advanced technical expertise is grounded in the following technologies and technical/ architecture areas in which she has accumulated more than five years of experience.

Technologies and technical/architecture areas:

Luz provides technical leadership and has executed the enhancements associated with migrating LRS/CalsAWS to a single platform (cloud). She continues to provide seamless integration between the architectures that interact and/or interface with CalsAWS. Luz has extensive experience and expert-level expertise in the following technical/architecture principles from architecting, delivering, and managing the implementation of these solutions for the CalsAWS system's infrastructure:

- Web and Application Servers – The CalsAWS technical architecture and infrastructure is deployed on Apache web servers and WebLogic application servers
- Cloud – The CalsAWS system is hosted on an AWS-cloud based architecture and uses key AWS services including RDS databases, S3, EC2, EBS, CloudWatch, VPC, and IAM. The CalsAWS Customer Service Center solution is based on the cloud-based AWS Connect platform, and the CalsAWS Imaging solution is based on the cloud-based Hyland platform. Luz also managed and led the design and implementation of event streaming architecture to support moving the CalsAWS system's data processing from batch processing to real-time where applicable
- Customized Off-the-shelf Software (COTS) – The CalsAWS solution integrates with COT applications such as:
 - Adobe Experience Manager for forms generation;
 - IBM Operational Decision Manager for the rules engine;
 - ForgeRock for identity access management (IAM);
 - Informatica for person search;
 - Oracle Database for database architecture and administration
 - Pitney Bowes Spectrum for address normalization;
 - ServiceNow for information technology service management (ITSM);
- Data Architecture – Oracle Database
- Data Warehousing – Qlik reports and analytics solution which includes an enterprise data lake and purpose-built data sets and utilizes AWS cloud services
- Security/Identity Management – ForgeRock Identity Access Management (IAM) enterprise solution that replaced the legacy Oracle solution and established an enterprise front door to the CalsAWS services
- Network solutions – Managed wide area network for Managed CalsAWS Counties, and secure integration between the CalsAWS and County networks, which supports performance requirements and access to County network resources (file and print services, etc.)

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

Project #2	Contact #2
Company Name: LA County DPSS	Contact Name: [REDACTED]
Project Name: LEADER Replacement System (LRS)	Company Name: [REDACTED]
Time Period: (Month, Day, Year – Month, Day, Year) December 1, 2012 – March 1, 2016; November 1, 2016 – March 3, 2019	Phone Number: [REDACTED]
Percentage of Time: 100%	Email: [REDACTED]
Staff Role: Enterprise Architect (Technology)	

Description of relevant experience: Luz provided high-level guidance and direction to LRS on enterprise architecture planning, making sure that new projects fit within DPSS's overall strategic vision. She aligned IT strategy and planning with DPSS's business goals, making sure projects did not duplicate functionality or diverge from each other or from business and IT strategies. Her advanced technical expertise is grounded in the following technologies and technical/ architecture areas in which she has accumulated more than five years of experience.

Technologies and technical/architecture areas:

Luz provided technical leadership provided seamless integration between the architectures that interacted and/or interfaced with the LRS. Luz has extensive experience and expert-level expertise in the following technical/architecture principles from architecting, delivering, and managing the implementation of these solutions for the for the LRS infrastructure:

- Web and Application Servers – The LRS technical architecture and infrastructure was deployed on Apache web servers and WebLogic application servers
- Customized Off-the-shelf Software (COTS) – The LRS solution integrated with COT applications such as:
 - Architected, planned, and managed the CalSAWS solution's integration with COT applications:
 - Adobe Experience Manager for forms generation;
 - IBM Operational Decision Manager for the rules engine;
 - Oracle Access Manager (OAM) for identity access management;
 - Oracle Internet Directory (OID) for directory services;
 - Informatica for person search;
 - Oracle Database for database architecture and administration;
 - Pitney Bowes Spectrum for address normalization;
 - ServiceNow for information technology service management (ITSM);

PART 2 – M&E ENTERPRISE ARCHITECT MINIMUM QUALIFICATIONS TABLE

- Oracle Business Process Management (BPM)
- Service Oriented Architecture (SOA) – The LRS solution was designed and developed on SOA and BPM, in YourBenefitsNow (YBN) self-service portal's web-based front-end
- Data Architecture – Oracle Database
- Data Warehousing – Oracle Business Intelligence Enterprise Edition
- Security/Identity Management – Oracle Access Manager (OAM) and Oracle Internet Directory (OID)
- Network solutions – Primary and back-up data centers and enterprise network, which included secure integration between the LRS and County networks and supported performance requirements and access to County network resources (file and print services, etc.)

Total Duration of all Projects cited to meet the MQ:			9 years, 4 months	
Minimum Qualification ME-S23		Hold and maintain for the duration of the contract a current certification: AWS Certified Solutions Architect.		
Certification / Degree Title	Certification Number	Original Grant Date	Expiration Date	Online Validation Link; if not available, attach a copy to the offer
AWS Certified Cloud Practitioner	MT0RLXVJDN1QQB9L	February 20, 2021	February 20, 2024	http://aws.amazon.com/verification
AWS Certified Solutions Architect	T3R2HK7C5BBEQCW5	December 2, 2022	December 2, 2025	https://aw.certmetrics.com/amazon/public/verification.aspx

aws  certified

Luz Esparza

AWS Certified Solutions Architect - Associate

VALIDATION NUMBER: T3R2HK7C5BBEQCW5

VALIDATE AT: <https://aws.amazon.com/verification>

Issue Date: Dec 02, 2022

Expiration Date: Dec 02, 2025