

11.9 ATTACHMENT 9 – FIRM REFERENCE FORM

Instructions:

Provide two (2) Firm References from two different Projects cited in the **Attachment 8 - Firm Mandatory Qualifications Table**. Each Firm Reference must clearly identify the Customer/Client Reference individual and that individual's Agency, Department, Organization or Company where the Contractor performed the experience.

The Firm references must be submitted within the Business Proposal as defined within RFP Section 6 - Proposal Structure and Submission, including signature of the customer/client reference.

References:

Provide two customer/client references from customers/clients who have first-hand knowledge of the Contractor's performance.

The Consortium reserves the right to contact individuals, entities, or organizations who have had contracts or relationships with the Firm proposed for this effort, whether or not they are identified as references, to verify that the Firm has successfully performed their contractual obligations on other similar projects.

Table 1 – Firm Reference Form

FIRM REFERENCE FORM	
Contractor Name: Deloitte Consulting LLP	
TABLE 1 – Reference's Information	
This information should match the information provided in Attachment 8 – Firm Mandatory Qualifications.	
Customer/Client Reference Name:	Lorna Eby
Customer/Client Reference Title	CalHEERS Project Director
Agency, Department, Organization or Company where Staff member performed:	State of California, Office of Technology and Solutions Integration (OTSI)
Project Title on which Staff member performed	California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)
Reference Phone Number:	[REDACTED]
Reference E-mail Address:	[REDACTED]

Instruction for References: The Contractor Staff above has listed you as a reference and is requesting for you to complete this Firm Reference Form. Please provide your comments and the appropriate rating based on your experience with the proposed Staff.

Step 1: Complete Columns 1-2 in Table 2 by marking "yes" or "no" and providing an explanation if needed.

Step 2: Complete Table 3 and provide your performance ratings.

Step 3: At the bottom of the page, print your name, your company's name, then sign and date.

Step 4: Return the completed, signed Staff Reference Form to Contractor.

TABLE 2 – The Reference Must Complete This Table.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 8 – Firm Mandatory Qualifications ?	Did this Firm perform the services described in Attachment 8 – Firm Mandatory Qualifications , including the functions as described and the time period provided on the project(s) that lists you as a contact?
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If “No” checked, explain here.)

TABLE 3 – The Reference Must Complete This Table.
The Reference shall complete performance and abilities statements for the proposed Firm and overall performance rating.
Performance and Ability Statements

TABLE 3 – The Reference Must Complete This Table.

The Reference shall complete performance and abilities statements for the proposed Firm and overall performance rating.

1. Describe the services provided:

Deloitte serves as the System Integrator (SI) vendor for the State of California's Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) infrastructure, maintenance, and operation services. Deloitte provides enhancements, security, maintenance, subcontractor and project vendor management, helpdesk support, and ongoing operations of core applications for the AWS cloud-based system.

A summary of the services that Deloitte has provided is listed below.

- Deloitte seamlessly migrated CalHEERS from an on-prem Data Center to the AWS cloud on time and within 18 months. This required migrating more than 450 terabytes of Production data.
- Deloitte modernized the data warehouse, leading to performance improvements. They also implemented Databricks, resulting in an open data lake architecture that can process 10x more data than the legacy system.
- Deloitte integrated and deployed software. This includes shifting Java applications from WebLogic to microservice architecture on Red Hat OpenShift platform. This also includes the shift from Oracle Exadata to Aurora PostgreSQL.
- CalHEERS and Deloitte partnered to architect and implement a modernized Cloud Data and Analytics platform, focused on Analytics Modernization. This focus was identified to tackle complex questions related to eligibility and enrollment analytics, plan choice analytics, and transition analytics.
- Using the tech stack of Snowflake, AWS, Databricks, and Tableau, Deloitte provides State leadership with leading edge cloud analytics capabilities that can be leveraged for stakeholder eligibility and enrollment decisions and provide key insight into digital user journeys for the health exchange.

2. Did the Contractor produce deliverables that met both the project specifications and the agency's expectations? Please describe briefly.

Yes, to date, Deloitte has produced high quality executive reports and deliverables and their performance has consistently met or exceeded expectations.

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

TABLE 3 – The Reference Must Complete This Table.

The Reference shall complete performance and abilities statements for the proposed Firm and overall performance rating.

3. If there were changes in the project, did the Contractor adapt to those changes and work through issues during all stages of the Project?

Yes. Deloitte has been a flexible and collaborative Contractor for the CalHEERS project, working together to solve complex challenges as they have arisen and frequently leveraging subject matter experts to provide insight to CalHEERS.

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

Yes. Deloitte and the State maintain open, timely, complete, and effective communication. Deloitte has partnered with us to implement a comprehensive communication plan to communicate effectively and transparently, enabling us to prioritize and address risks and issues as they were identified and to effectively adapt to changes.

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. Deloitte has managed multiple Subcontractors for the CalHEERS project since the inception of their contract, including the following:

- KP Corp – serves as the print vendor to meet Printing and Imaging needs and associated SLAs
- GetInsured – served as one of the COTS software vendors implementing enhancements and fixing defects within applicable SLA(s)
- NTT – served as the on-prem hosting services provider to meet System Availability SLAs, and
- Amazon Web Services (AWS) – serves as the cloud hosting services provider.

Deloitte has managed its subcontractors effectively. And no, our organization has not had to mediate between Deloitte and its subcontractors.

TABLE 3 – The Reference Must Complete This Table.

The Reference shall complete performance and abilities statements for the proposed Firm and overall performance rating.

6. Was the Project a success?

Yes, we have had a successful partnership to date. At the onset, Deloitte transitioned the system from the incumbent vendor in 9 months, 3 months ahead of schedule, with 100% system availability and minimal stakeholder and consumer disruption.

Additionally, Deloitte has implemented hundreds of system enhancements while maintaining the day-to-day operations. Deloitte provides enhancements, security, maintenance, subcontractor and product vendor management, helpdesk support, and ongoing operations of core applications for the AWS cloud-based system. The size and complexity of the platform has increased since Deloitte transitioned in as the contractor, however, over time we have been able to lower M&O Services costs through annual budget planning, monitoring, and review activities.

During the annual Renewal and Open Enrollment (R&OE) period, millions of Californians, as well as hundreds of administrators and enrollers, use the platform to determine eligibility and shop for health plans. This results in 36,000+ average daily users, supporting 55 million+ daily transactions. Deloitte has modernized the CalHEERS system to accommodate this traffic and can support 149,000 user visits and 98 million transactions a day during peak R&OE period.

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


Yes.

8. Optional Comments:

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

By signing this form, the Reference is certifying that all information provided on this form is correct.

Lorna Eby	Ca1HEERS
Name of Reference (print)	Name of Company Reference (print)
	7/24/2024
	Date