

# Evolve the foundation

## Executive Summary Section 1

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**The CalSAWS Consortium becomes a truly integrated and program-centric organization, evolving and innovating its systems and processes more rapidly to meet the needs of Californians with Deloitte by its side.**

**Setting a national standard with Deloitte by your side**

In 2020, California needed a modern, cloud-hosted, mobile-responsive, self-service portal to complement its move to a single, statewide system. The Consortium and Deloitte delivered (and during a global pandemic, no less). BenefitsCal is now available to any Californian seeking access to critical health and human services. As your former Director recently testified in the California State Assembly, we have set the national standard for a modern self-service portal.

The Consortium has used the past five years to make transformative changes in how it supports Customers and Counties—transformative technical changes. All Counties determine eligibility in one system now—CalSAWS. The Consortium has the technical foundation, between BenefitsCal and CalSAWS, to do even bigger things for Californians in need.

**This procurement enables us to evolve together to meet the moment.**

Technology continues to rapidly advance (as do customer service expectations of California residents). Artificial Intelligence (AI, GenAI) alone is expected to revolutionize how we support BenefitsCal and how it supports Customers and Counties. We're ready to help the Consortium not only evolve the foundation that BenefitsCal and CalSAWS provides, but also enable the Consortium to operate in an integrated, program-centric manner that enables it to do bigger things for more Californians.

In 2020 the Consortium needed to stand up a new self-service portal, integrate it with CalSAWS, and support California as it moved to one statewide eligibility system. The Consortium's needs going forward are different. With this in mind, we have restructured our team and reevaluated our collaboration methods to better align our services with your current requirements.

**Our new goal: To enable the Consortium's continued success.**

In the following pages, we describe our plan to collaborate with the Consortium to improve stakeholder engagement, increase adoption and continue to evolve BenefitsCal.

*Let's Evolve the Foundation Together*

# Realizing the Benefits of full integration

## The Vision

**Fully integrate with CalSAWS ecosystem and adhere to PMO, Delivery Integration (DI) and System Change Requests (SCRs).**

The Consortium matures its program management across the CalSAWS ecosystem more quickly and thoroughly by working with Deloitte. Our experience across your 58 Counties, a staff that thoroughly grasps E&E, and our history delivering in the Consortium's environment enable us to provide trusted advice and management to the Consortium's staff.

BenefitsCal cannot be isolated from CalSAWS or the other technologies that the Consortium manages. Changes to BenefitsCal must be planned and managed collaboratively across systems and vendors. This means decision-making and system roadmaps must meet the needs (many of them pressing needs) of different user groups (e.g., workers, Customers, County supervisors, Community-Based Organizations [CBOs]) and be balanced for the Consortium to succeed.

**Deloitte is the best vendor to help the Consortium balance the needs and communicate across all the players that serve Californians.**

## Why Deloitte?

- Our team brings dozens of years of experience working with California Counties (of all sizes). This helps us anticipate their needs, better estimate SCRs, and engage with them on the future of BenefitsCal.
- Our proposed Project Manager, Onur Senman, and PMO Lead, Radhika Rastogi, bring more than 20 years of experience coordinating large projects and working in multi-vendor environments.
- During the transition phase, we assess the current program management process and make recommendations for improvement to the Consortium.
- Serving as the future vendor for CalSAWS M&E, as well as for BenefitsCal helps us to coordinate and manage issues and reduces distraction for the Consortium.



## The Vision

**Continue to enhance the Collaboration Model (CM) and stakeholder engagement and communication processes.**

The Consortium fully operationalizes its Collaboration that makes sure the voice of the customer is not overshadowed by other stakeholders by using Deloitte's public engagement and UCD approach.

The Consortium has one of the most complex and active stakeholder environments in the country. As a result, its success is highly dependent on how well it engages stakeholders. The Consortium needs a transparent and responsive process for prioritizing how change occurs not only to BenefitsCal, but also other public facing aspects of CalSAWS.

We have been successful in this environment because we understand it. This is demonstrated by the result of our last contract – BenefitsCal, one of the country's leading portals. We're ready to evolve with the Consortium's CM for what California needs next.

## Why Deloitte?

- We built the current UCD approach with the Consortium. We know what works and what doesn't. We are committed to evolve our approach to meet the Consortium's business and the interests of the stakeholder community. A core focus of the upcoming contract is projecting and measuring results to justify priorities and demonstrate their impact.
- Our delivery team and extended leadership team brings 20+ years of experience working with the Consortium and has engaged in the Collaboration Model. This enables us to know whom to contact before, during, and after formal meetings to make sure everyone is on the same page.
- We have extensive experience managing self-service portals and Eligibility and Enrollment (E&E) solutions in 33 states. We know how to complete holistic analysis across these critical solutions and deliver staff fully experienced in the life cycle of Customers experience with E&E programs.
- We propose enhancing our stakeholder engagement approach via regular visits to County offices in the next contract period. This strategy can broaden our comprehension of your needs, elevate transparency in our decision-making and prioritization processes, and promote a smoother integration of BenefitsCal with County office operations.





## The Vision

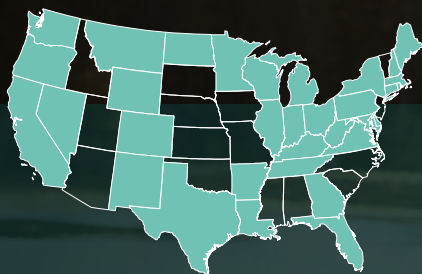
**Expand and refine User-Centered Design (UCD) and User Experience (UX) in the software development process.**

The Consortium evolves and matures its UCD process faster by building on the BenefitsCal foundation and expanding it to CalSAWS, with Deloitte stewardship across both core systems.

Refinement is different from invention. BenefitsCal stakeholders may not worry about software upgrades in a release roadmap, but if those upgrades don't happen, BenefitsCal is wide open to security risks, lack of support from software companies, and potentially reduced system usability.

Implementing changes that reflect BenefitsCal users' needs is the Consortium's most powerful tool in delivering for California's Counties and Customers. We get it. The UCD and UX processes we have implemented with the Consortium are good. But they can be better. We're ready to elevate them with you.

**33**  
States



### Eligibility & Enrollment

AR, CA, CO, CT, DE, FL, GA, IL, IN, KY, LA, MA, ME, MI, MN, MT, ND, NH, NM, NV, NY, OH, OR, PA, RI, TN, TX, VA, WA, WI, WY, WV

**Includes TANF, SNAP, Medicaid, Child Care, LIHEAP, LTC, CHIP, HCBS**

## Why Deloitte?

- We continue to do user research both in California and nationally. It enables us to focus on the right problems when designing BenefitsCal functionality.
- We propose improving our UCD process with a renewed focus on post-implementation measurement and refinement of user impact measures. We couple this with a UCD continuous improvement framework detailed later in our response.
- Unlike other vendors, we bring a network of 33 states, as shown below in Figure 1-1, where we manage systems with the same purpose as BenefitsCal. We use this network to inform our advice to the Consortium on enhancements and issues, as demonstrated recently during the pandemic.
- Deloitte is at the forefront of AI applications in human services environments. AI will change how Californians interact with BenefitsCal. We'll be there with the latest thinking and innovation that is already and will be happening across the country.

## Impact that Matters

### Increasing Customer Satisfaction with UCD and Two-Way Messaging

In July 2022, the Consortium and Deloitte implemented secure two-way messaging between customers and County caseworkers. The feature, designed with UCD input, improved the customer experience, reduced case processing delays, and enabled quicker access to benefits. As of June 2024, over 750,000 messages have been sent across 22 participating Counties.

**Figure 1-1. A National Network By Your Side to Help Californians in Need.**



## The Vision

### Enhance communications and marketing to increase visibility and outreach for the public, Counties, and CBOs.

The Consortium reduces noise and improves relations across its complex stakeholder environment by enhancing its current processes with Deloitte's experience, tools, and understanding.

BenefitsCal is up and running, and maturing as a system. Everyone (the Consortium, Counties, Customers, CBOs) advances the more the public uses it to apply for and retain benefits. No one likes to wait in line or be on hold. CBO staff want to be able to help people in their community. Current technologies and marketing techniques can improve the awareness, perception and adoption of BenefitsCal for a further return on California's investment.

To significantly improve how well California is adopting BenefitsCal, it is critical to have a team constantly thinking about the channels and methods available to market BenefitsCal to diverse user segments with different needs occupying different support ecosystems. A Shasta County resident has a life entirely different from someone in Los Angeles County. How we interact and communicate with each one is different and impacts BenefitsCal's continued success.

### Why Deloitte?

- We're not a race to the bottom on rates, "keep-the-lights-on" teaming partner. We think holistically about program goals and issues. Our staff understand technology, people, processes, and California's complex environment. This enables us to be a true business advisor in communicating with the Consortium's stakeholders.
- Deloitte's Proposed Communication Lead, Shonna Clark, brings over 17 years of work on public communication campaigns, including, most recently, in Tennessee where she managed the COVID unwinding media campaign.
- We prioritize equity and inclusion in our marketing campaigns to accelerate BenefitsCal adoption.
- Deloitte brings a dedicated practice, Deloitte Digital (17,000+ strong), which uses technology and UCD to build systems, processes, and solutions that enhance client engagement with customers, as shown below in Figure 1-2.
- Approaches to getting people's attention have changed dramatically in the past five years. We can help you harness new technologies to engage Californians.

## Public Outreach in action



### Modern Marketing and Advertising Techniques to Maintain Medicaid Eligibility in Illinois

During the pandemic, the federal government put a freeze on Medicaid eligibility closures. Meanwhile, the Illinois Medicaid population grew by nearly a million people. In 2023, after the freeze, recipients needed to renew their Medicaid certifications.

With Deloitte's help, the State launched an advertising and marketing campaign to remind residents about Medicaid renewals—in 15 languages, via text messages and telephone helpline improvements.

Illinois had one of the best renewals rates in the country, with 78 percent of its Medicaid recipients retaining their Medicaid coverage. Illinois's approach earned kudos from CMS.

**Figure 1-2. Helping Illinois Use Modern Marketing and Communication to Make an impact.**

## The Vision

**Evolve application/architecture and innovate by expanding data analytics capabilities for evidence-based outcomes.**

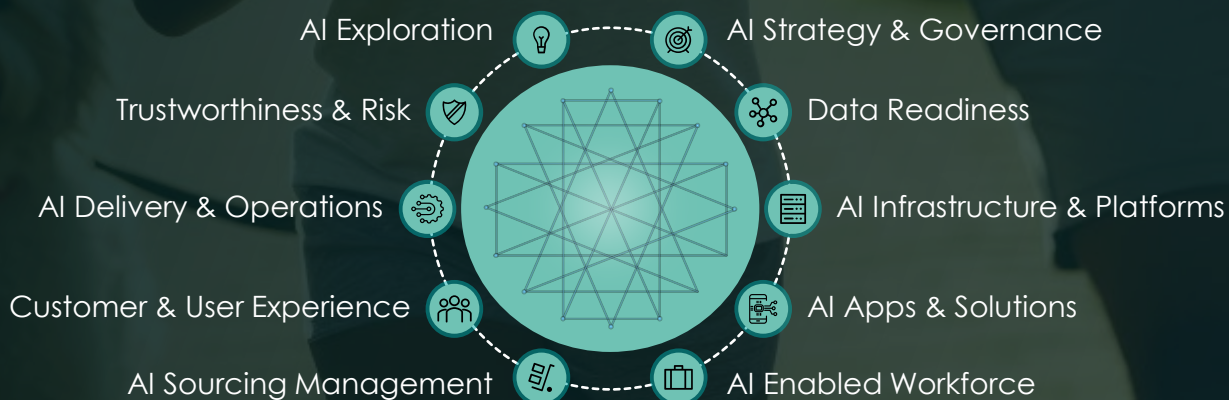
The Consortium anticipates, evaluates, and adopts innovations faster and more thoughtfully with Deloitte's alliances, AI capabilities, and national network of E&E systems by its side. Our team's understanding of the Consortium's current governance and collaboration processes helps make everything work.

BenefitsCal is an asset. Like most assets, it depreciates in value if you don't maintain and invest in it. Investing means keeping it current with software patches and upgrades. It also means evolving it to include new technologies that improve the Consortium's ability to support Counties, CBOs and Customers.

The Consortium has a vast quantity of data at its disposal in BenefitsCal and CalSAWS, and in our digital age, everyone has a public digital footprint. To succeed in the next contract period, the Consortium needs a vendor who can help it make more data-driven decisions and use AI and other analytic technologies to drive toward its goal. Deloitte is the best vendor to meet this moment.

## Why Deloitte?

- Deloitte can help the Consortium engage in the AI revolution. We have implemented 120+ AI engines in 30+ U.S. states since 2015. We bring an AI management framework, illustrated below in Figure 1-3, to enable how the Consortium adopts AI to strategically meet its goals and objectives.
- Gartner has named Deloitte a worldwide leader in data and analytics. We bring 27,000+ AI-skilled practitioners, with 10,000+ full-time dedicated professionals delivering AI services worldwide.
- We can use our E&E network to jumpstart innovation on BenefitsCal. For example, we are building a Large-Language Model (LLM) to change how Tennessee interacts with Medicaid receipts. We can import lessons learned and leading practice to seed BenefitsCal innovations.
- As BenefitsCal moves to more evidence-based outcomes coordinating data sharing with CalSAWS will be crucial. As the awarded M&E vendor coordinating end to end data dependencies will be easier and more swift.



**Figure 1-3. AI Readiness and Management Framework.**



## The Vision

**Continually evolve infrastructure and application security for robust, reinforced cybersecurity measures.**

With Deloitte by its side, the Consortium continues to protect Californians' data and benefits from security vulnerabilities with our world-class, analyst-acclaimed cybersecurity practice.

In the next decade, one of the greatest challenges to the Consortium, and any government agency, is keeping customer data secure. As cyber threats escalate and diversify in an increasingly interconnected IT environment, institutions need risk-intelligent capabilities and cybersecurity controls to guard against escalating attacks. You need to be ever-vigilant and continuously assess your safeguards to mitigate gaps and test for resiliency.

**Security is a foundational component in our BenefitsCal delivery approach.**

## Why Deloitte?

- As highlighted in Figure 1.4 below, we are the #1 cybersecurity consultant as rated by Gartner since 2011, highlighted below in Figure 1-4, our team of cybersecurity advisory professionals have an unparalleled ability to collaborate with leading solution vendors. We integrate our approach to risk management, and security and privacy compliance framework to meet federal and state security requirements.
- Our team embeds security due diligence through every stage of BenefitsCal's Software Development Life Cycle. We bring strategic alliances to help secure, connect, and manage users' digital identities. With our significant experience in the design and delivery of complex, large-scale IAM solutions, Deloitte combines our IAM expertise with a range of supporting disciplines: privacy for all user data, security testing and certification, and digital expertise in self-service systems.

**#1 globally in security consulting since 2011**

Source: Gartner, Market Share Analysis: Security Consulting Services, Worldwide, 2022, by Rustam Malik, 14 July 2023



**Collaboration with leading government agencies and industry associations** on cybersecurity standards, advanced threat solutions, and cyber resilience practices



**Identify** strategy, implementation, and managed services with ecosystems and alliances



**21,000+**

**Risk management and security professionals** through a global network of member firms



**2,300+**

**Cyber risk engagements** since 2017 across all major industries

**4,000+**

U.S.-based cyber risk practitioners

**800+**

Total practitioners across Identity Services

**600+**

Identity management projects delivered in last 2 years

**20+**

Years providing Identity services to clients

**Figure 1-4. Your Data and Customers are Protected by Going with Deloitte.**



# The Right People

for the right time



**Michael Henry**  
Transition Manager

20+ years of experience in large and complex implementations, overseeing 3 large IT system projects for state and federal clients



**Onur Senman**  
Project Manager

16+ years of technology experience, focused on Health and Human Services and working with stakeholders and contractors



**Blake Weyland**  
UCD Lead

10+ years leading UCD/UX design activities including discovery research, prototyping, and usability



**Avinash Shankla**  
Application Manager

14+ years directing enterprise-wide Oracle cloud implementations and technology solutions for a wide array of clients



**Gretchen Larson**  
Product Manager

5+ years of functional product management experience serving in product manager roles across the public and private sectors



**Karthik Krishnamurthy**  
Security Manager

15+ years of experience in cybersecurity and 8 years working with the State of California, leveraging his skills to design IT safeguard mechanisms



**Radhika Rastogi**  
PMO Lead

3+ years of PMO experience supporting government and private sector clients in project management



**Mufaddal Tinamaker**  
Testing Manager

13+ years of testing experience, serving as testing manager for BenefitsCal since the project's inception in 2020



**Shonna Clark**  
Public Communications Lead

17+ years' experience in communications and marketing; has worked for government agencies in the state, civilian, higher education, and defense sectors

## Coverage for the Community

**The Consortium gets people you know—and who have your back—when you team with Deloitte.**

Our 50-year record of successful delivery in California means we live and work right here with you. We are part of your community. Success in California matters to us.

When a storm hits, like the Great Recession or the recent COVID-19 pandemic, we offer you the umbrella of the largest professional services firm in the world.

Deloitte is ready to tackle the complexity, risks, and issues of evolving BenefitsCal to continue to be a world-class self-service portal.

**We've got you covered.**

# Why it Matters

**Deloitte is the best vendor to help the Consortium evolve the BenefitsCal Foundation to achieve its goals.**

The Consortium has a choice of vendors. As you review our proposal, and those of other vendors, we ask you to consider the following questions. We look forward to continuing to serve you and delivering a world-class BenefitsCal system.

**01**

**Does this vendor offer you access to successful solutions and tested approaches?**

A version of BenefitsCal (and CalSAWS) exists in all 50 states. Deloitte current operates and enhances them in over half those states—more than all other vendors combined. Having access to this national network jumpstarts ideas and enhancements that California is considering. Do you want to figure everything out yourself or learn from other states' experiences?

**03**

**Does this vendor offer you real innovation?**

Many vendors use buzz words and say they innovate. But do they? Deloitte brings a history of firsts in multiple industries, specifically E&E social services: The first E&E self-service portal (2003). The first web-E&E worker eligibility system (2007). The first cloud-hosted E&E system (2012). The first use of AI in E&E (2022). For Deloitte, innovation is real, not just a buzz word.

**02**

**Does this vendor have experience working with the complete stakeholder ecosystem in California?**

Many vendors have engaged with some of the CalSAWS external stakeholders but not all. Recently advocate representatives have publicly acknowledged the advancements in collaboration between BenefitsCal and the external community. Together we have built momentum that we will continue to advance.

**04**

**Do you want to spend the next six months training a new vendor—or getting work done?**

Since 2021, we have made big strides with the Consortium. You saw that in the way we designed and implemented BenefitsCal—one of the country's best self-service portals. Wouldn't you rather keep evolving BenefitsCal instead of hitting pause for six months while you bring a new vendor up to speed? The Consortium has great momentum right now. Keep it going with Deloitte.

*Evolve the Foundation.*