

11.11 ATTACHMENT 11 – KEY STAFF REFERENCE FORM

Instructions:

For each Key Staff role, provide two (2) Individual References from two different Projects cited in the **Attachment 10, Part 2 - Key Staff Minimum Qualification Table**, unless only one (1) project is used that meet the MQs identified in this RFP. If only one (1) cited project meets the MQs, then two references from that project are required. Each Individual Reference must clearly identify the Customer/Client Reference individual and that individual's Agency, Department, Organization or Company where Key Staff performed the experience.

The Individual 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 job skills, experience, and abilities cited in the résumé.

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

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name: Mike Henry	
Part 1 – Reference's Information This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications .	
Customer/Client Reference Name:	Perminder Bagri
Customer/Client Reference Title	Chief of Enterprise Architecture
Agency, Department, Organization or Company where Staff member performed:	California Office of System Integration (OSI)
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 Staff 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 Part 2 by marking “yes” or “no” and providing an explanation if needed.
- Step 2:** Complete Part 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.

Part 2 – The Reference Must Complete This Table.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 10 – Key Staff Resumes /Qualifications for the Contractor's Staff named at the top of this page prior to your completion of this form?	Did the Contractor's Staff named at the top of this page perform the services described in Attachment 10 – Key Staff Resumes /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.)

Part 3 – The Reference Must Complete This Table.

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

Performance and Ability Statements

1. Describe the performance of the Contractor's Staff during this engagement.

As the transition manager for the CalHEERS transition in, Michael was instrumental in ensuring that the transition could be completed within the agreed upon timeframe. He worked with stakeholders to anticipate issues, manage critical-path activities and worked with executives to prioritize and execute. He also worked with executives to develop contingencies to manage to the big picture and deliver ahead of schedule for a smooth transition.

2. Describe the ability of the Contractor's Staff to perform the contractually, required work in a timely manner.

Under Michael's leadership, the successfully transitioned the CalHEERS system from the incumbent vendor during the COVID-19 pandemic in 9 months (3 months ahead of schedule) with 100% availability and minimal disruption to stakeholders, plan members, and consumers.

3. Describe the verbal and written communication skills of the Contractor's Staff.

Michael demonstrated his verbal and written communication skills to lead knowledge transfer sessions by directing the transition plan, publishing status reports, and submitting deliverables.

4. Describe the ability of the Contractor's Staff to engage in positive working relationships with other coworkers.

During the transition period, Michael developed positive working relationships with coworkers and vendors. He worked collaboratively with all stakeholders to ensure a successful transition from the incumbent vendor.

5. Describe the knowledge of the Contractor's Staff in the required areas of expertise.

As the Engagement Transition Manager, Michael was a primary point of contact for performing operational transition including overall activities, communications, and escalations. He managed and supported alignment across the transition team and facilitated productive discussions with client leaders in understanding transition-activities, timelines, and impacts. Michael also gave strategic input and guidance to the

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project management team during the maintenance of technical and management aspects of the CalHEERS engagement.

6. How well did the Contractor handled engagement with end users and User input.

Michael collaborated with stakeholders for a smooth transition and developed, managed, and maintained the transition-in plan. He anticipated issues and worked across stakeholder groups to manage, communicate, and resolve issues for a smooth transition.

7. Would you rehire this person?

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 individual's overall performance?

10

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

Permindar Bagri

State of California

Name of Company Reference (print)

Jul 24, 2024

Date