

Staffing Approach

Section 3

RFP Reference: 6.3.3.5 Section 3 – Staffing Approach

RFP Reference: 6.3.3.5.1 Staffing Approach Narrative

RFP Reference: 6.3.3.5.2 Staffing Experience Details

As we continue our journey with BenefitsCal, we recognize the importance of evolving together. Our strong foundation, built on dedicated teamwork and shared successes, positions us well for the BenefitsCal M&O Project. We bring together familiar faces who have been instrumental in delivering BenefitsCal alongside fresh perspectives from our recent Health and Human Services engagements. This blend of continuity and innovation helps us remain responsive to your needs and committed to our shared goals.

BenefitsCal is entering a new era—one that requires both a deep understanding of past operations and a forward-looking approach. The approach focuses on increasing adoption, amplifying awareness and perception, promoting equitable and inclusive accessibility, and securing crucial customer information all while exploring emerging technologies to enable this new era. Our proposed key staff bring over 108 years of collective experience across multiple specialized domains to manage, operate, and evolve BenefitsCal, supporting and accelerating the Consortium's goals. They all have chosen to build their careers in Health and Human Services (HHS) with a mission-focused, empathetic mindset. Why does this matter? Our team knows what is at stake if Californians cannot reliably count on a means of accessing services in their most vulnerable time of need.

Our proposed team combines intimate knowledge of BenefitsCal, its integration with the CalSAWS enterprise, and extensive nationwide experience in HHS. They have a proven track record in developing and managing Self-Service Portals and direct experience with BenefitsCal systems. Our team's blend of capabilities positions us to meet the Consortium's vision and goals. Our team is familiar with the complexities of the Consortium operations and has successfully implemented solutions that align with its strategic objectives. We are committed to providing efficient, low-risk M&O services. Our focus is on ongoing stability and enhanced service delivery. We implement strategies and innovations that not only reduce operational risk but also protect data integrity.

Section Highlights

- Our proposed staff bring, collectively, over 108 years of relevant experience delivering BenefitsCal.
- Our management team has experience across E&E programs and BenefitsCal's core technology to guide the Consortium.
- Our team brings over 22 years of direct experience working with California and County agencies.
- Our team brings together the experience of having been the original BenefitsCal implementer and current maintenance and enhancement vendor with complementary experience from team members from other states.

How this Section is Organized

Table of Contents

3.1	Staffing Approach Narrative	3-1
3.1.1	BenefitsCal Staffing Approach (S1)	3-2
	Criteria Used to Select Our Key Staff	3-6
3.1.1.1	General Contractor Staffing Responsibilities	3-7
	Providing Staff Necessary to Fulfill the Contract.....	3-7
	Agreement Price for Additional Staff	3-10
	Facilitating Productive Working Relationships with Consortium Staff, County staff, other Consortium contractor staff, and State staff/project sponsors.....	3-10
	Proactive Coordination and Collaboration with Consortium and Other Stakeholders	3-11
	Deloitte's BenefitsCal Organizational Chart	3-12
	Organization Model.....	3-14
3.1.1.2	Staff Responsibilities	3-14
	Communication Skills and Working with Diverse Groups.....	3-14
	Project Meeting Preparation and Participation	3-16
	Identifying and Escalating Issues	3-16
	Approach to Minimizing Staff Turnover	3-17
3.1.1.3	Contractor Staff Changes.....	3-19
	Addressing Expected Key Staff Changes	3-19
	Addressing Unexpected Key Staff Changes	3-20
3.1.1.4	Staff Performance	3-21
	Skills and Experience Necessary to Fulfill Responsibilities	3-21
	Identifying and Correcting Performance Issues	3-21
	Procedures for Consortium Identified Performance Issues	3-22
3.1.1.5	Staffing Worksheet (S2)	3-23

3.1.2	Key Staff	3-24
3.1.2.1	BenefitsCal Project Manager	3-25
3.1.2.2	BenefitsCal Project Management Office Lead	3-25
3.1.2.3	BenefitsCal Transition-In Lead.....	3-26
3.1.2.4	BenefitsCal Application Manager	3-26
3.1.2.5	BenefitsCal Product Manager.....	3-27
3.1.2.6	BenefitsCal User Centered Design Lead	3-28
3.1.2.7	BenefitsCal Testing Manager.....	3-28
3.1.2.8	BenefitsCal Security Manager.....	3-29
3.1.2.9	BenefitsCal Public Communication Lead	3-29
3.1.2.10	Key Staff Client References	3-30
3.1.3	Additional Insight Partners and Specialists.....	3-30
3.2	Staffing Experience Details	3-35
3.2.1	Staff Resumes and Qualifications	3-35
3.2.2	Key Staff Client References	3-35

Tables

Table 3-1.	Selection Criteria for Deloitte Staff	3-6
Table 3-2.	Engagement Guiding Principles.....	3-11
Table 3-3.	Approach to Communication	3-15
Table 3-4.	Key Steps of Issue Management Process	3-17
Table 3-5.	Examples of Methods Deloitte Uses to Minimize Turnover.....	3-18
Table 3-6.	Performance Review Activities Carried Out by the Deloitte Leadership Team.....	3-22

Figures

Figure 3-1.	Staffing Approach.....	3-2
Figure 3-2.	The Four Types of Deloitte's Business Chemistry Model.	3-6
Figure 3-3.	Deloitte's GPS Capabilities Enhance the BenefitsCal Project.	3-8
Figure 3-4.	BenefitsCal Services Tasks and Subtasks.....	3-9
Figure 3-5.	Deloitte's M&O Organizational Chart.....	3-13
Figure 3-6.	Issue Management Process.....	3-16
Figure 3-7.	Proactively Managing Staff Changes.....	3-19
Figure 3-8.	The BenefitsCal Leadership Team	3-24

3.1 Staffing Approach Narrative

With more than 415,000 professionals worldwide and the largest eligibility & enrollment (E&E) practice in the United States, we meet our responsibilities of Consortium's BenefitsCal portal mobile contract with the right resources, in the right locations, at an optimal price point. We primarily service this contract with professionals from our Government and Public Sector (GPS) practice. Our GPS practice of over 25,500 US-based professional provides a wide array of specialized services to 49 states and Federal Government. The following subsections details our tailored strategy and our approach to bring an expert team designated to elevate BenefitsCal to unprecedented level of success in partnership with you.

3.1.1 BenefitsCal Staffing Approach (S1)

5.2.2.1 Staffing Approach

S1

The Bidder will provide a narrative describing the overall Staffing approach to the BenefitsCal Services addressing the Staffing subsections.

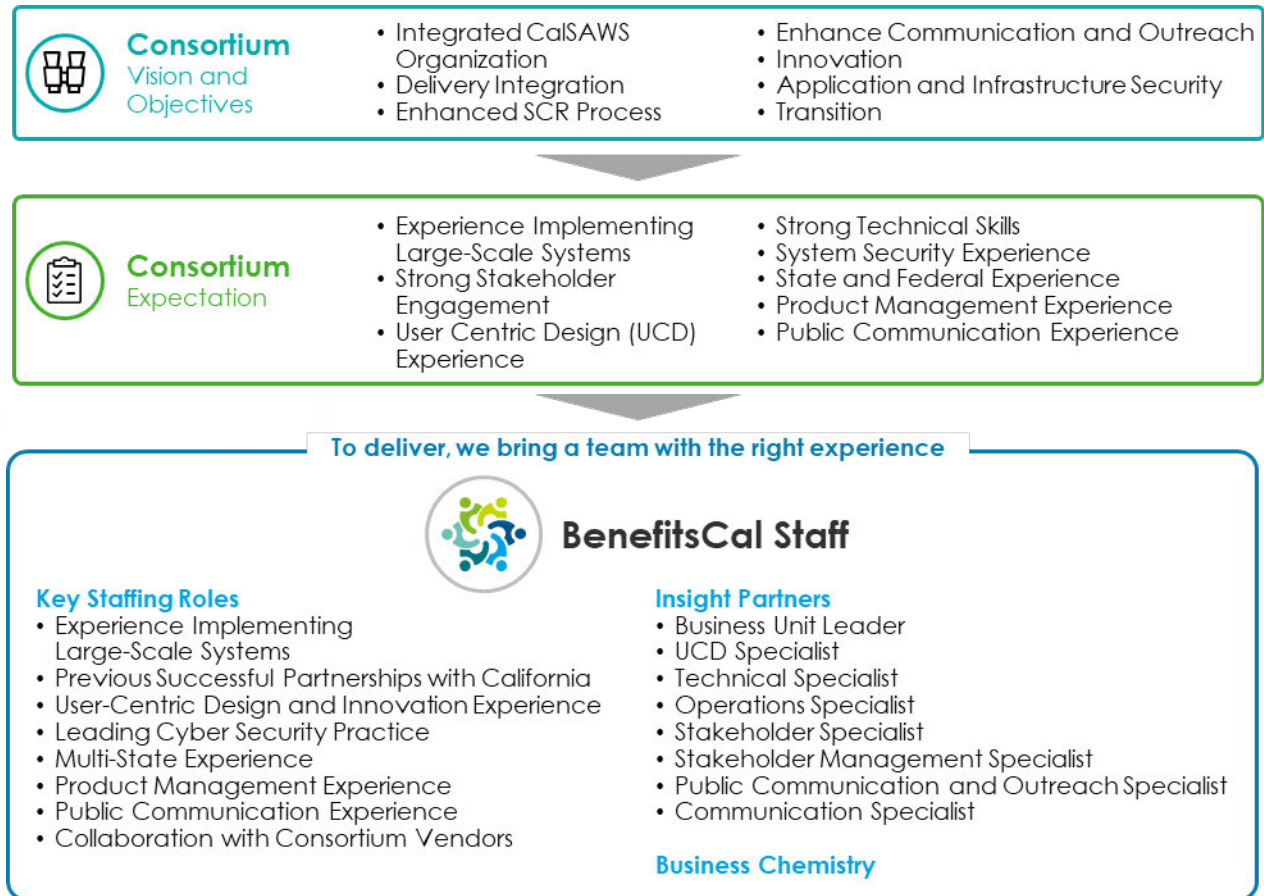
Based on past implementation projects of similar nature and complexity, Deloitte understands the importance of the Consortium's need to work with familiar resources throughout every phase of the project, as well as the value provided by a workforce with diverse backgrounds. This enables the Consortium to keep its existing structure while supplementing with new and fresh perspectives that can help drive innovation as the team works toward new milestones.

Our proposed team comprises of key personnel carefully selected for their qualifications as outlined in your RFP and for their alignment with the Consortium's vision and objectives. These individuals have direct experience in multi-contractor environments, particularly in areas like Self-Service Portals, and Eligibility and Enrollment (E&E) solutions. They have demonstrated proficiency in project management, product management, public communications and marketing, user-centric design, application customization, change management, user support services, technology evolution and innovation, production operations, and cyber risk services.

As has been our approach with the existing BenefitsCal contract, our team is not just the team that you engage with on a daily basis. We augment our team with guidance from seasoned leaders who enhance and support our core BenefitsCal M&O team. When fraud schemes arose during the pandemic tied the pandemic unemployment assistance (PUA) and unemployment insurance (UI), Deloitte brought in leaders from our national program integrity team to share with the Consortium additional controls (e.g., email dotting) to introduce in the CalSAWS enterprise and shared with our interface partners at GetCalFresh. In looking at ways to reduce the BenefitsCal cloud spend, we engaged members from our national AWS alliance to build out a POC using Graviton that was later implemented and has reduced the total cost of ownership of BenefitsCal. As Deloitte, the Consortium and CWDA navigated through legislative hearings, Deloitte engaged leaders familiar with the BenefitsCal ecosystem to assist with preparing the response. This is what you should expect from your BenefitsCal Contractor. An

organization that has reach to bring in solutions and do so as part of their standard way of delivering.

For this contract we have identified seasoned leaders that: know the Counties and CalSAWS ecosystem, led cyber risk and threat intelligence efforts for similar systems, driven communications for a former Governor and Deloitte's own public relations, served as a legislative liaison for one of the State Partners, and leads Deloitte's Digital Transformation and Customer Experience efforts for the State of California. The collective experience and expertise of our proposed team members, as shown in Figure 3-1, distinguishes us from other firms in the field.



CA_CON_BenefitsCal_IO-074287_2024-0065_6

Figure 3-1. Staffing Approach.

Criteria Used to Select Our Key Staff

We have selected individuals who are committed to supporting the BenefitsCal M&O Services contract. With extensive knowledge of the necessary requirements, our unified team is dedicated to achieving a fully functional and secure BenefitsCal system. For our key staff, proficiently maintaining and operating an E&E system is fundamental to our operations. Table 3-1 summarizes the selection criteria we used to build your BenefitsCal M&O Services team.

Selection Criteria	Why It Matters	How Our Team Meets This Need
Successful track record with BenefitsCal	BenefitsCal stands out as the most unique self-service portal in the United States, distinguished by its pioneering fully cloud-native and serverless architecture. Mastery of this advanced technology, combined with our proven track record in successfully delivering the BenefitsCal portal, is essential for sustaining and building upon our success.	<ul style="list-style-type: none"> • Three of our key staff (Onur Senman, Mufaddal Tinmaker, Karthik Krishnamurthy) have been leading the M&E efforts with the current BenefitsCal contract. • Onur Senman coordinates directly with the Consortium leadership, providing executive-level reporting to Consortium management and collaborating with them to mitigate escalated risks and introduce new technologies. • Surranjan Kumar worked with the Consortium to strategize, plan, and use the budget to meet policy priorities. He has experience delivering application changes and assessing system issues in tandem with the Consortium. • Karthik Krishnamurthy oversaw security for CalSAWS, regularly briefing Consortium leadership on cyber risks, threats, and performance. • Mufaddal Tinmaker manages BenefitsCal testing activities, coordinating with and supporting the Consortium with maintaining releases, tracking defects, and scheduling. • More than 90% of our non-key staff have served and/or are serving BenefitsCal and other Consortium projects.
User Centric Design and Innovation Experience	Elevating the human experience is fundamental to BenefitsCal and requires a team continue to advance UCD and UX success within the Consortium's environment to foster effective communication and innovative, holistic solutions.	<ul style="list-style-type: none"> • The team continues to evolve proven UCD experience, leveraging innovative methodologies and tools to further refine UCD processes, including strategic GenAI applications for precise research tasks. • Our team is trained and certified in various UCD and UX research and design principles with a focus on creating accessible and inclusive customer experiences. • Our team's proficiency in UCD is highlighted through our innovative co-creation process, designed to cater specifically to students. This initiative involved developing a homepage, FAQs, and an application flow tailored to support students applying for benefits. Anchored in detailed user research, this strategy effectively tackled the challenges and barriers faced by students during their academic pursuits. • After opting to advance her higher education focused on design, Ellie Bayard Arthur will be returning to BenefitsCal to work with Blake Weyland, UX Lead, who

Selection Criteria	Why It Matters	How Our Team Meets This Need
		brings experience from the California Department of Public Health and California CARES projects.
Comprehensive Cyber Risk Experience in California and Elsewhere	Safeguarding Californian's data and benefits is the cornerstone of BenefitsCal success. The Consortium requires an experienced leader in cybersecurity to strengthen existing measures and advance the security of its applications with particular experience with NIST 800-53, California SAM and ZTA.	<ul style="list-style-type: none"> Security Manager Karthik Krishnamurthy has been an integral part of the BenefitsCal team since its inception. He has successfully collaborated with the Consortium Security Team and vendors to secure end-to-end BenefitsCal operations. Karthik plays a crucial role in proactively designing and implementing security controls tailored to the BenefitsCal evolving threat landscape. He integrates Deloitte's acclaimed cyber security capabilities and methodologies into our delivery approach.
Public Communications Experience	Our experienced leaders' firsthand experience with the Consortium gives them key insights into how to communicate BenefitsCal information to the public in a way that mitigates customer confusion and eases the burden on County help desks.	<ul style="list-style-type: none"> Shonna brings 17 years of specialized communications and marketing experience across government and public sectors. Her strategic initiatives, focused on enhancing public perception and supporting vulnerable populations, have significantly boosted program recognition and societal impact. Her role focuses on enhancing BenefitsCal's visibility through strategic communications and marketing, creating accessible materials, and expanding partnerships to boost community outreach and engagement. Our team consists of professionals from various public sector backgrounds, skilled in navigating the complexities of customer communication. Karen Walsh joins our team as the Public Communication Specialist for the BenefitsCal project. She leverages her extensive background in government crisis communications.
Collaboration with Consortium Vendors	BenefitsCal is just a piece of the larger CalSAWS enterprise. Successfully working within the multi-contractor environment is crucial to accelerate resolution of issues and deliver end to end solutions and responses to the CalSAWS stakeholder community.	<ul style="list-style-type: none"> Three members of our key staff are currently operating in leadership roles on BenefitsCal and regularly engage with Consortium's other vendors, including IV&V, CalSAWS, Technical Service Desk and QA vendors, as part of their daily routine. They also engage with GetCalFresh and FIS interface partners on a routine basis. We have a longstanding history of working with Gainwell (formerly EDS and HPE) on the original CalWIN contract and most recently

Selection Criteria	Why It Matters	How Our Team Meets This Need
		<p>on BenefitsCal where we engage with them as the Technical Service Desk provider.</p> <ul style="list-style-type: none"> Our BenefitsCal Security Team works very closely with the CalSAWS ForgeRock team from initial integration with ForgeRock to mandating Multi-Factor Authentication to updates for NIST 800-53 rev 5 requirements and Zero Trust Architecture.
Multi-State Experience	While having California E&E experience is important, key staff should have exposure to other projects across different states. Having multi-state experience is critical for adopting best the best practices across the industry and applying them to BenefitsCal.	<ul style="list-style-type: none"> Our key staff and leadership team have worked across 13 states maintaining, operating and modernizing statewide HHS systems.
Product Management Experience	The BenefitsCal system is continually evolving to meet short-term needs and long-term objectives. Having experienced key staff who can navigate the consortium through prioritization, development, and implementation is vital to balancing both.	<ul style="list-style-type: none"> Product manager Gretchen Larson has over 13 years of experience demonstrating her ability to enhance product strategies and balance objectives throughout the product life cycle.
Experience Implementing unique BenefitsCal Technical Architecture	The intricate and unique technical architecture of BenefitsCal requires a vendor with a deep understanding of its nuances, agility, and constraints. This knowledge is crucial for effectively navigating and optimizing the BenefitsCal infrastructure.	<ul style="list-style-type: none"> With 26 years of industry experience, our Application Manager, Avinash Sankhla, offers a valuable blend of cloud expertise and business acumen, positioning him ideally to lead the next phase of evolution for the BenefitsCal architecture. Project Manager Onur Senman brings more than 16 years of experience in large-scale system implementations, including over three years dedicated to BenefitsCal. His deep technical understanding of the BenefitsCal portal empowers him to enhance service delivery by expertly managing the program and refining processes for improved efficiency and superior user experience.
Experience Engaging with the Extended BenefitsCal	The stakeholder ecosystem for BenefitsCal stretches across labor unions, advocacy organizations, CBOs, student organizations,	<ul style="list-style-type: none"> We have engaged Frank Mecca, former CWDA Executive Director to serve in the capacity of stakeholder specialist to bring insights into stakeholder engagement

Selection Criteria	Why It Matters	How Our Team Meets This Need
Stakeholder Community	State Partners, Assembly/Senate members, CWDA, Counties and the Consortium. Navigating this environment requires diplomacy and finesse.	<p>activities with State Sponsors, employment unions, advocates and Counties.</p> <ul style="list-style-type: none"> • Megan Lape joins our team, formerly with the California Department of Social Services, to provide support regarding legislative inquiries. • Onur Senman and Mufaddal Tinmaker routinely engage CBOs, student organizations, advocates and CWDA to share BenefitsCal research, field questions and solicit feedback on proposed changes to BenefitsCal.

Table 3-1. Selection Criteria for Deloitte Staff.

Mixing the Right Business Chemistry Profiles

In addition to the criteria above, we seek to staff our teams with a mindset of diversity in experience, approach, and thought. For years, Deloitte has staffed projects by considering the work styles, or business chemistries, of our team members to develop a balanced team whose members complement each other. Deloitte's Business Chemistry® model draws on the latest analytics technologies to reveal four scientifically based patterns of behavior within business.

The scope of the M&O services contract requires a diverse range of working styles. These include driving project schedules, pioneering new technologies, performing detailed root cause analyses for service desk incidents, and engaging empathetically with Counties, customers, and Community-Based Organizations who reach out to the Contact Center. When staffing involves individuals who all share or work well in the same working style, conformity can occur, potentially leading to suboptimal results. We emphasize the importance of our staff remaining authentic to their true selves; this authenticity enables them to deliver their best performance. The four Business Chemistry types are shown in Figure 3-2.



CA_CON_BenefitsCal_JO-074287_2024-0004_2

Figure 3-2. The Four Types of Deloitte's Business Chemistry Model.

Developed by scientists, the Business Chemistry model provides insights into individuals and teams based on observable traits and preferences. By understanding these differences, our proposed staff improve the effectiveness of their interactions with other

types of individuals, as well as combinations of types in team environments. We have included our proposed staff's Business Chemistry profiles so that you may better understand their styles and why we have selected them to serve on our team.

3.1.1.1 General Contractor Staffing Responsibilities

5.2.2.1.1 General Contractor Staffing Responsibilities

The Contractor is responsible for providing all Staff necessary to fulfill the Services and requirements defined in this RFP. Any increase to the Agreement price for additional staff will only be allowed pursuant to the Consortium Change Order process.

The Contractor is responsible for employing an approach for Staff management that facilitates a productive working relationship with Consortium Staff, County Staff, other Consortium contractor Staff, and State Staff/Project Sponsors. All Contractor Staff are expected to proactively coordinate and work cooperatively with the Consortium.

The Bidder must include an organization chart displaying the relationships of the BenefitsCal Services team and include the relationships of the BenefitsCal team to the Consortium and other Consortium contractors.

The Consortium benefits from collaboration with a vendor, whose staff brings production-proven experience in maintaining, operating, and enhancing systems of BenefitsCal's size, scale, and complexity. The effectiveness of this arrangement is further enhanced by our commitment to provide talent with substantial public facing portal expertise, UCD experience, and a deep understanding of the Consortium's ecosystem.

Providing Staff Necessary to Fulfill the Contract

Our firm employs over 415,000 professionals worldwide and maintains the largest E&E practice in the United States. This extensive network means we are prepared to meet the diverse and dynamic needs of the Consortium's BenefitsCal contract. We offer a unique combination of global presence and local precision that sets us apart in the industry. Our services are comprehensive and customized to meet the specific needs of each client, delivering high-quality outcomes consistently. As highlighted in Figure 3-3, our Government & Public Sector (GPS) practice consists of over 25,500 U.S.-based professionals experienced in administering specialized services to 49 states and the federal government. This dedicated group is the primary force behind our servicing of the BenefitsCal contract and brings a nuanced understanding of government operations and public sector requirements.



CA_CON_BenefitsCal_JO-074287_2024-0013_3

Figure 3-3. Deloitte's GPS Capabilities Enhance the BenefitsCal Project.

This section outlines our comprehensive approach to meeting the RFP Statement of Work (SOW) requirements and services through strategic staffing and resource allocation, depicted in Figure 3-4.

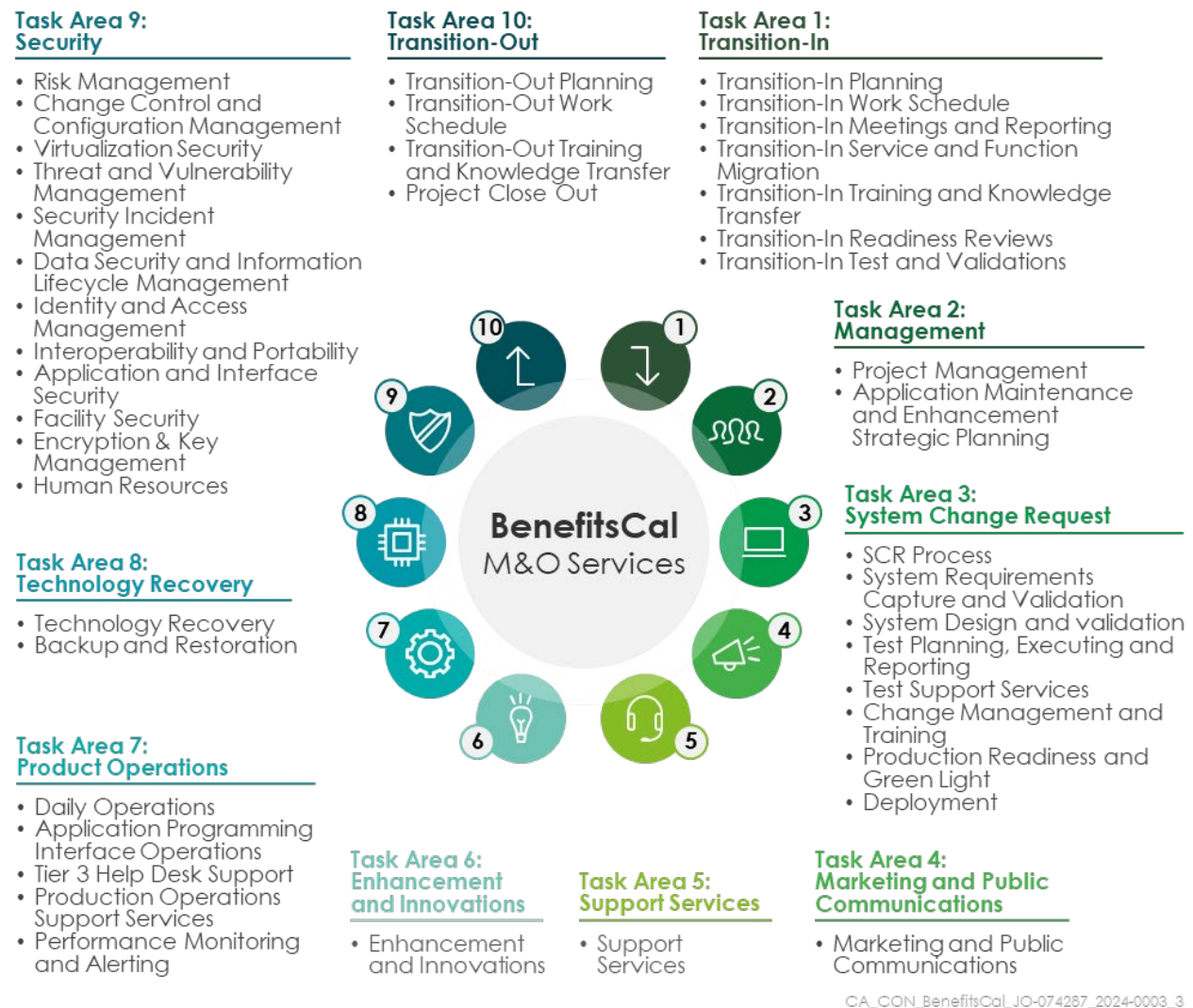


Figure 3-4. BenefitsCal Services Tasks and Subtasks.

Large Subcontractor Network for Specialized Capabilities

Given the mission-critical nature of the services delivered as part of the BenefitsCal Services SOW, we have opted not to subcontract portions of the contract to another vendor, but rather to augment our team with resources through our Contingent Workforce Services (CWS) function. CWS allows Project Manager, Onur Senman, the flexibility to quickly onboard additional resources as needs arise through the enhancement process. Deloitte forms strategic subcontracting relationships to provide the most qualified team to support our engagements and will work with the Consortium for pre-approval before engaging subcontractors.

Nationally, we work with over 1,500 different companies. This reach allows us to efficiently find and deploy the right resource for the right situation. We carefully select subcontractors based on their ability to deliver high-quality services and high-quality people. To be considered for subcontracting with Deloitte, firms must have a credible corporate background with a proven record of outstanding client services, a common goal to deliver client satisfaction, and high-quality experienced resources appropriate to their respective project roles.

Agreement Price for Additional Staff

Deloitte acknowledges and agrees that increases to the agreement price for additional staff is allowed only pursuant to the Consortium change order process. Our approach mitigates additional increases to the agreement price while making space for changes if the demand of the project calls for them. If additional staff are required, Deloitte follows the Consortium change order process.

Facilitating Productive Working Relationships with Consortium Staff, County staff, other Consortium contractor staff, and State staff/project sponsors

The Consortium requires a trusted advisor to continue the effective and efficient delivery of BenefitsCal services. The Deloitte BenefitsCal team has built a strong working relationship with the Consortium, Counties, CWDA, and Consortium Partners to successfully navigate the complex ecosystem across the State. Our team members have a proven track record of collaborating effectively within the Consortium's ecosystem, establishing strong relationships with stakeholders involved. This collaborative effort and level of trust have formed productive working relationships between Deloitte and the Consortium, County, and State Staff.

Our leadership team uses a set of guiding principles, listed in Table 3-2, that are embodied across the lifespan of our engagements to support our team, build trust, and maintain strong working relationships. These principles are founded in mutual respect, integrity, and a spirit of building a “One Team” mentality. Building trust is the way forward for elevating the human experience as explored by Deloitte leader Amelia Dunlop in her book *Four Factors of Trust: How Organizations Can Earn Lifelong Loyalty*. The pillars of transparency—being human, being credible, and being reliable—are fundamental to our Deloitte culture. We promote individual collaboration with Consortium staff, BenefitsCal contractors, interfacing partners, Counties, and other stakeholders. This promotes a productive working environment across our blended project team.

Principle	Actions We Take Based on This Principle
Establish Common Purpose and Norms	<ul style="list-style-type: none"> Assemble leaders across the Consortium, Counties, Consortium contractors, and the Deloitte leadership team to define team norms, values, and preferred methods of operation. Review key dates, deliverables, cross-team dependencies, and potential roadblocks to success. Identify preferred cadence and methods of communication and collaboration.
Ethics and Fairness	<ul style="list-style-type: none"> Use data, technology, and systems in an ethical, fair, and trusted manner.

Principle	Actions We Take Based on This Principle
	<ul style="list-style-type: none"> Define methods to identify, track, and monitor risks, issues, and impediments.
Growth and Passion	<ul style="list-style-type: none"> Encourage staff to grow, learn from others, and co-create. Channel the mission-driven passion each team member possesses to help drive forward project goals and objectives. Mentor counterparts on the context around decisions and directives. Celebrate everyone's diversity in thought, experiences, and perspectives; encourage them to challenge the status quo while still managing risk.
Collaboration and Personal Relationships	<ul style="list-style-type: none"> Identify methods to celebrate successes across the entire team. Celebrate individuals going above and beyond their assigned tasks and responsibilities. Create opportunities for formal and informal collaboration, celebration, and cross-team collaboration. Share a vision and goal of working toward the same "North Star." Create a culture of "one team" instead of Consortium versus contractor.
Transparency and Openness	<ul style="list-style-type: none"> Be transparent in decisions. Give credit where credit is due, regardless of team or title. Share information openly; discuss challenges and mistakes. Lead and manage the growth mindset across all levels of the team.

Table 3-2. Engagement Guiding Principles.

Our integrated team structure detailed later in **Deloitte's BenefitsCal Organizational Chart**, also encourages collaboration, communication, and shared responsibilities across the team.

Proactive Coordination and Collaboration with Consortium and Other Stakeholders

We understand the Consortium's objective to fully integrate with the CalSAWS ecosystem and adhere to established processes to foster collaboration within the integrated multi-contractor environment. Together, we have successfully navigated a complex, multi-contractor environment as proven by BenefitsCal use across the State through a proven UCD process. Our team has developed strategies to proactively coordinate and enhance collaboration. At BenefitsCal, our team has established the following processes to proactively coordinate effective communication channels, and enhance collaboration:

- Stakeholder Feedback:** BenefitsCal holds monthly meetings with the Consortium, Advocates, Consortium Partners, Counties, and CWDA to share research findings, evaluate proposed designs, and gather feedback.
 - Stakeholder Inclusion:** BenefitsCal conducts pre-release design sessions to actively involve stakeholders in the enhancement and development process.
 - Stakeholder Engagement:** BenefitsCal conducts orientation webinars for Community-Based Organizations and Counties and engages in bimonthly SSP Committee Meetings to inform stakeholders of significant updates and releases related to the self-service portal.

- **Partner Coordination:** BenefitsCal conducts regular meetings and discussions with partner systems to align functionalities and coordinate on any forthcoming system changes.

Effectively Using Hybrid Work Environments

To enhance collaboration across the Consortium, the Deloitte Team, and other contractors during ongoing operations, we have established a suite of tools designed to maintain alignment. Recognizing the hybrid nature of our work environment, we use Microsoft Teams to synchronize our joint team activities across different systems. Although technology plays a crucial role in facilitating communication, we acknowledge that the most robust relationships stem from direct, in-person interactions, complemented by our teleconferencing capabilities.

Additionally, Deloitte is well-equipped to operate within a multi-contractor framework. Each contractor operates under its own set of agreements, deliverables, schedules, and methodologies. Deloitte's proficiency in such environments is well-documented through our previous engagements with various State of California projects, including BenefitsCal, CalWIN ISS, California's Medicaid Management Information System (CA-MMIS), Child Welfare Services–California Automated Response and Engagement System (CWS-CARES), California Cybersecurity Strategy, and CalHEERS, as well as numerous E&E projects nationwide.

We are prepared to work with other contractors as we have done successfully in last four years with BenefitsCal. We have a clear understanding of what we are tasked with to operate and manage BenefitsCal and are actively involved regardless of what badge we wear on the project. The role we play is more than just helping maintain the BenefitsCal M&O; it is to help bring together the Consortium and other contractors to meet SLA requirements, continually optimize system performance, and effectively identify and mitigate risks. We sustain a collaborative environment to support a fully functional CalSAWS ecosystem.

Deloitte's BenefitsCal Organizational Chart

You can rely on our highly skilled team to deliver quality, provide stability, and prioritize your vision of a fully integrated enterprise organization within the Consortium. We supply a staff with a combined 36 years of E&E experience, working alongside the Consortium for 12 (combined) years. Our key personnel have your required attributes and meet the requirements for each of the key positions described in the RFP. Our organizational chart illustrates our team structure and lines of accountability within our team.

In our organizational chart (Figure 3-5), a key icon (●) identifies key staff positions. Resumes for each key staff member can be found in **Attachment B10–Staff Resumes and Qualifications**. The chart includes additional non-key personnel who add significant value to the Services contract. The organization is structured to demonstrate the collaboration and relationships of key BenefitsCal-related work threads to the Consortium and other Consortium contractors.

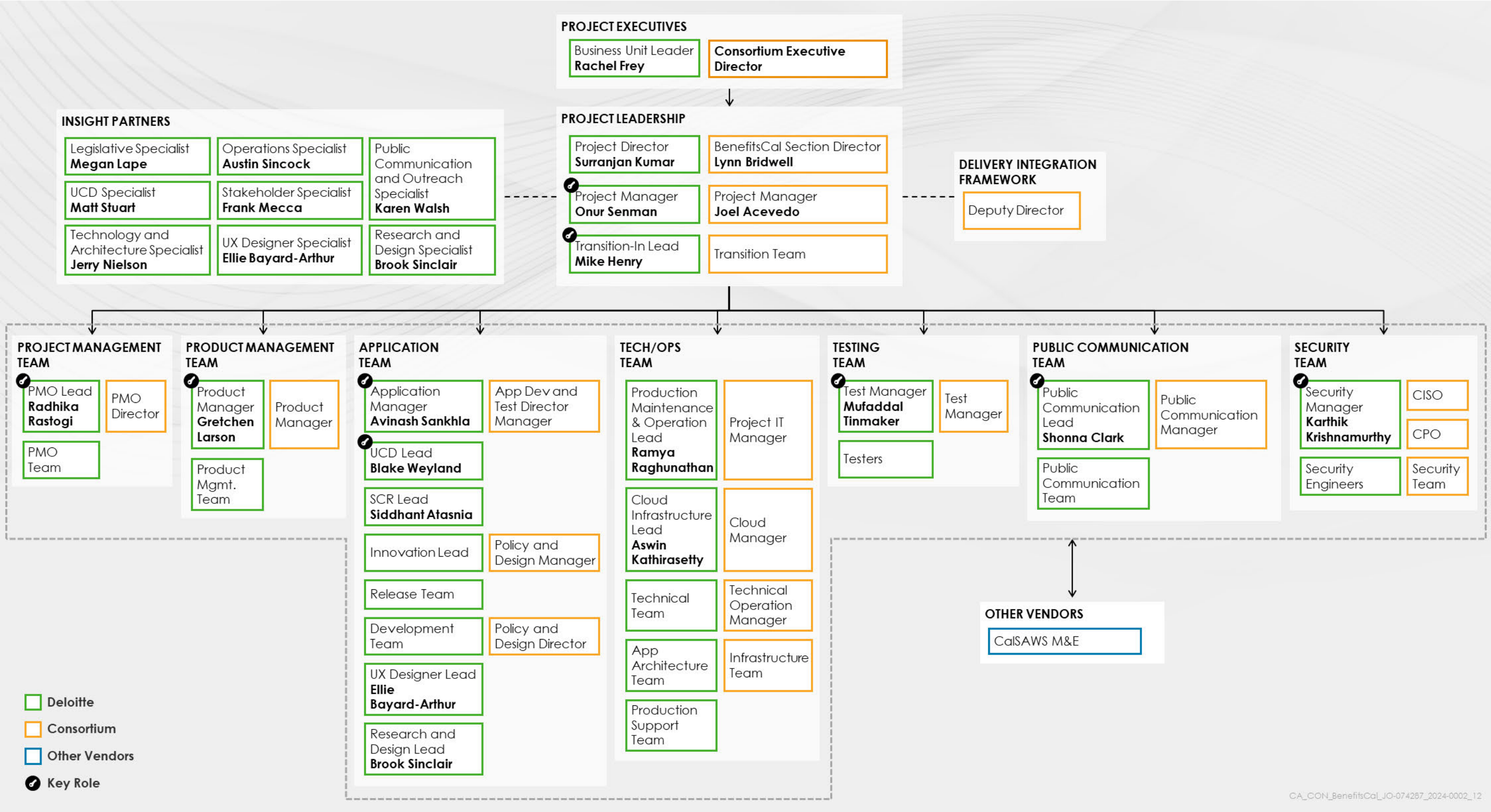


Figure 3-5. Deloitte's M&O Organizational Chart.

Organization Model

Our staffing is based on a mirrored organization model, which assigns distinct responsibilities, encourages smooth interactions, and focuses attention on project activities between our leadership and staff and yours. Alignment between the Deloitte staff, the Consortium, and Consortium contractors provides clear communication channels between staff members assigned ownership over similar parts of the project. For example, Project Manager Onur Senman serves as the primary Deloitte counterpart to the Consortium leadership team for planning, development, and execution of M&O services. Proactively aligning team members facilitates faster issue resolution, helps keep the project on schedule, and supports joint ownership of issues and milestones.

Open and clearly defined lines of communication are critical to cross-team collaboration. At every level, the Consortium and Counties need timely and accurate information about the project. We hold these expectations for all projects we manage.

3.1.1.2 Staff Responsibilities

5.2.2.1.2 Staff Responsibilities

All proposed Contractor Staff must have good oral and written communication skills. One aspect of good oral communication skills includes the ability to communicate with diverse groups of users and to convey information technology terms and concepts to non-technical audiences.

All Contractor Staff must prepare for and actively participate in designated Project meetings and represent the best interests of the Consortium and identify and escalate issues as appropriate.

To facilitate Project progress, it is important to the Consortium that the Contractor minimizes Staff turnover to the extent possible, particularly for Key Staff as detailed below.

Communication Skills and Working with Diverse Groups

Good oral and written communication skills are critical to a work environment and its people. A lack thereof causes extreme frustration when people do not feel heard. We must proactively reach out to understand what Counties are experiencing as it relates to M&O services. Communicating out is as important as reaching out to gain this perspective through formal channels like the CRFI process and through field observation, interviews, and focus group sessions.

Our proposed staff bring, at a minimum, a bachelor's degree in their chosen field, experience working in diverse groups, and excellent oral and written communication skills. Our staff also undergo a rigorous hiring process that includes multiple interviews assessing their communication acumen. The interviews include both behavioral interviews and case studies as well as interviews with multiple Deloitte staff. This enables us to confirm:

- Ability to convey IT terms and concepts to non-technical audiences and to use business and program terminology accurately to relate to policy and program staff.
- Ability to perform their assigned role and corresponding tasks and responsibilities.
- Ability to prepare for and actively participate in designated project meetings and represent the Consortium's best interests.

Additionally, as Deloitte staff progress in their career, they receive ongoing training commensurate with their level. They can also join non-career progression trainings including our “Art of...” series, which focuses on listening, empathy, and storytelling. Some of these trainings specifically focus on oral and written communication skills. If a team member’s communication skills do not meet Consortium expectations, they are either addressed or the individual is removed from the project.

Communicating With Diverse Groups of Users

The Consortium engages with a wide array of stakeholders, such as its own staff, multiple contractors, county staff (including IT departments), Customers, CWDA, the JPA Board, the Project Steering Committee, CalSAWS and BenefitsCal committee members, the Quality Assurance team (ClearBest), sponsors, employment unions, and advocacy groups. Our team leverages over 23 years of experience working closely with these groups, including participation in federal IT meetings. Communicating technical concepts in lay-person terms is important to getting diverse groups of people to agree on requirements, designs, and project plans. All our team members are trained in human-centered design concepts, and this extends to communications—it is not limited to designing systems. We also employ some of the approaches shown in Table 3-3 to communicate technical concepts.

Objective	Approach
Preparation	Provide pre-read materials users can read on their own to help digest topics
Effective Communication	Learn and use the specific language and terms familiar to the groups or individuals you are communicating with, whether they are JPA, PSC, Consortium Sponsors, CWDA, Counties, the Consortium, Advocate co-leads or other stakeholders.
Engagement	Hold regular communication touchpoint meetings to address questions across stakeholder groups
Clarity	Use simplified terminology and engaging visuals, such as screenshots or live demos, to help aid non-technical audiences
User Guidance	Provide Quick Reference Guides (QRGs) that break down instructions and common issues in a step-by-step manner
Technical Expertise	Include the right person from the team who understands the technical detail
Simplification of Technical Details	Provide information in a digestible format and do not cause cognitive overload when discussing technical concepts; use a summary and detailed approach to break complex topics into subtopics

Table 3-3. Approach to Communication.

Our leadership team is committed to inclusively tailoring communication methods and styles for each group. As a diverse group of professionals, we embrace the opportunity to consider perspectives and suggestions from all involved, including Consortium Sponsors/Staff, the Counties, CWDA, and other contractors. We prioritize maintaining an equitable communications standard that fosters a sense of belonging across interactions.

Project Meeting Preparation and Participation

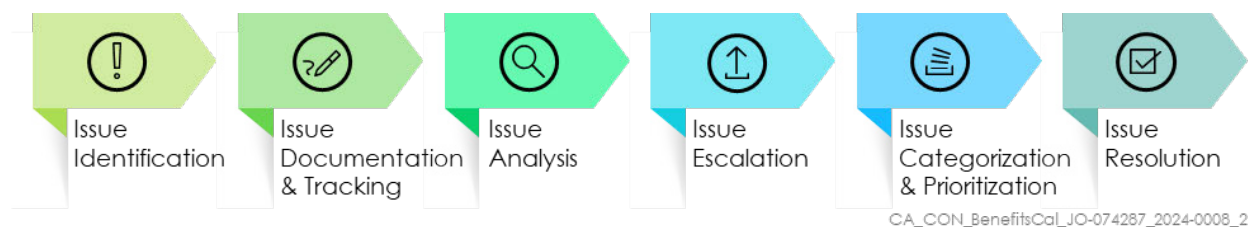
Our team is well-prepared and actively engaged, bringing the latest and most relevant information to every meeting, including status updates, strategy sessions, and impromptu discussions. By preparing in advance, we effectively report on project status and metrics, address issues, and collaborate on risk mitigation strategies with the Consortium and other contractors. This proactive approach protects the interests of the Consortium and Counties. We are ready to engage, collaborate, and advocate for the Consortium's best interests in various meetings, such as PSC, JPA, committee meetings (e.g., CalWORKs, CalFresh), federal IT meetings, State Sponsor Meetings, and CDSS stakeholder meetings. We coordinate with the Consortium beforehand to align on key messages and sensitive topics for discussion.

Our team prepares for meetings knowing that we might need to gather additional information. We commit to promptly providing answers or updates at the next scheduled meeting, as coordinated with the Consortium and other CalSAWS contractors.

Identifying and Escalating Issues

Not addressing project issues quickly can slow down work, increase redoing tasks, and risk the quality and timing of important BenefitsCal activities. We manage issues according to the Consortium's guidelines in the Project Control Document (PCD), aiming to solve problems at the lowest organizational level to speed up project delivery. From our experience, we evaluate the impact of risks and their likelihood of becoming issues. Often, we've already handled similar issues in other projects, which helps lower the overall risk for this project.

Deloitte plans to use the Consortium's risk and issue tool to efficiently log and track issues, simplifying the escalation process and enhancing transparency for better decision-making during the transition-in phase. Currently, the process is manual, requiring individuals to notify others of changes. By switching to Jira, this manual effort will be significantly reduced. Issues can occur at any project phase and must be addressed quickly to avoid affecting the schedule, scope, quality, and budget. Deloitte's six-step issue management approach aligns well with the Consortium's four-step process, as detailed in Figure 3-6 and Table 3-4.



CA_CON_BenefitsCal_JO-074287_2024-0008_2

Figure 3-6. Issue Management Process.

Steps	Description
Step 1: Issue Identification	A potential issue that may impact project progress is identified.
Step 2: Issue Documentation and Tracking	Based on the issue's source, the issue is logged into the risk and issue management tool in SharePoint to track the issue to completion. The identifying party is responsible for entering a description of the issue, identification date, and the potential team responsible for resolving the issue.
Step 3: Issue Analysis	Deloitte team members assess issues by analyzing their source, cause, and impact on systems and business, and then develop resolution recommendations. An initial priority is set for each issue to guide its escalation. The issue is then assigned to a project team member with a target resolution date. Issues unresolved at lower levels are escalated to section directors and reviewed by the risk management group.
Step 4: Issue Escalation	Depending on many factors, including the issue's effect on scope, budget, quality, and schedule and the impact on business users, the issue is escalated to risk management group.
Step 5: Issue Categorization and Prioritization	The Consortium and Deloitte collaboratively identify the category of business area to which the issue belongs, the priority of the issue, and a plan for resolution that includes the target due date and assigned resources.
Step 6: Issue Resolution	Deloitte works with the Consortium team to resolve the issue. Once an issue is resolved, it is marked as complete in the risk and issue management tool, as appropriate.

Table 3-4. Key Steps of Issue Management Process.

Approach to Minimizing Staff Turnover

People are attracted to roles for different reasons than what keeps them long-term. High turnover, which can be costly and cause project delays and confusion, increased during the pandemic as individuals reevaluated their careers. Despite these challenges, Deloitte reinvested in its workforce, growing our headcount by 40% and launching Project 120. This initiative has provided over one million hours of training in AI, cloud, cyber, data analytics, and 5G through the Deloitte Technology Academy.

Staff thrive when their work environment supports them in achieving a common set of goals and objectives. Our approach to minimizing turnover is to focus on investing in a meaningful career for our professionals. As a result, Deloitte is a recognized leader where individuals want to work and grow. Our approach minimizes turnover and leads to long-term continuity of resources on our engagements even during this new transition in the market where professionals frequently change careers.

Deloitte's wide range of services is backed by significant, long-term investments in our professionals. Our staff often stays with us long-term due to comprehensive training, performance rewards, a strong sense of community, competitive benefits, support for

wellness and flexible lifestyles, and exposure to diverse clients. Table 3-5 outlines our strategies to minimize turnover.

Method	Description
Training	<ul style="list-style-type: none"> • Deloitte University (DU): Located in Westlake, TX, Deloitte University (DU) is our top facility for learning and leadership development. It boosts technical, professional, and leadership skills, immerses attendees in Deloitte's culture, and helps build firm-wide relationships, enhancing employee morale and retention. • Deloitte Internal Boot Camps: We enhance our employees' continuous learning by offering intensive training in Project Management, Hybrid Agile, Big Data, and E&E, and by implementing cross-training and apprenticeship programs to broaden skills. Deloitte stands out as a workplace where employees can diversify and upgrade their skillsets internally, avoiding the need to seek opportunities elsewhere. • Communities of Practice: Deloitte fosters a culture of knowledge sharing across the firm through forums like the Global Cloud Community and Yammer, where professionals can freely exchange ideas and best practices. • Our HHS Nerve center is a professional network of professionals from across the firm where policies, technologies, and best practices related to social service transformation can be discussed and shared. This deep knowledge pool gives skilled professionals room to develop and grow within Deloitte. • Sponsored Certifications: With free access to learning resources, professionals often have the option to seek out certifications and build new skills, ranging from soft skills like project management to technical skills GenAI.
Rewards and Recognition	Professionals making significant contributions receive Shout Outs and Spot Awards via our Rewards and Recognition (R&R) program, enhancing their sense of value and aiding retention. Deloitte's Total Rewards and Benefits program provides a comprehensive suite of resources to support our professionals' life journeys.
Community Building	Deloitte's retention efforts extend beyond career support, fostering connections through community work, office events, and volunteering, including our annual Impact Day every June. This day invites all employees and subcontractors to engage in non-profit activities meaningful to them, strengthening ties to our work, colleagues, and clients.
Competitive Benefits	In response to the high demand for competitive benefits, Deloitte offers an exceptional package to retain employees, including over 20 days of annual PTO, 401K matching, pension plans, six months of parental leave, and subsidies for equipment and travel, distinguishing us from competitors.
Wellness Support	Our wellbeing programs offer opportunities for our employees to use discounts and subsidies toward a variety of fitness activities and virtual fitness throughout the week. A wellness goal-setting kit, available to all professionals, gives employees a comprehensive tool to set mental and physical wellness goals.
Diverse Staffing Opportunities	Deloitte's consulting practice serves hundreds of clients, offering staff diverse project experiences and skill development opportunities. This dynamic environment enables professionals to grow internally, reducing the need to seek external opportunities. Our team has collaborated with 21 state and federal clients.

Table 3-5. Examples of Methods Deloitte Uses to Minimize Turnover.

3.1.1.3 Contractor Staff Changes

5.2.2.1.3 Contractor Staff Changes

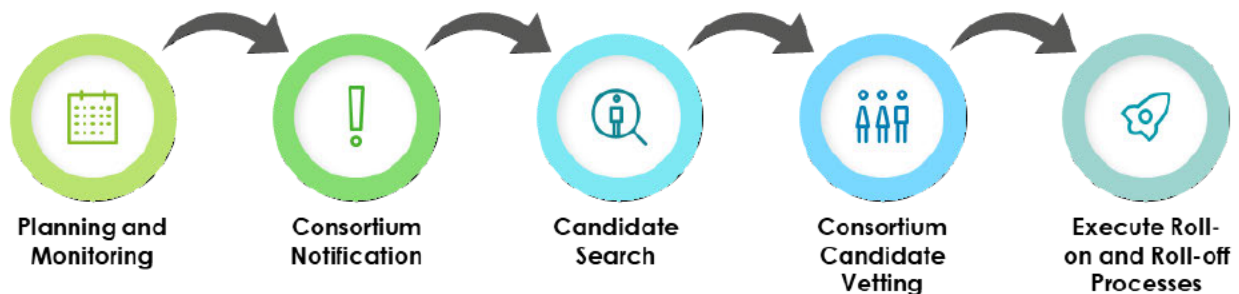
For any expected Key Staff changes, the Contractor will provide a 30-calendar Day notice to the Consortium Executive Director regarding the change and plans for transition. The Contractor will provide at least two resumes with proof of experience that meets or exceeds the mandatory qualifications as defined in this RFP, and two references for any recommended replacement Key Staff. The Consortium reserves the right to require face-to-face or video interviews of all proposed replacement Key Staff. The Consortium reserves the right to accept or reject any proposed Key Staff.

For any unexpected Key Staff changes, the Contractor will provide the Consortium Executive Director a written notification within three business days of knowledge and required Key Staff action. Within seven (7) calendar days of providing such written notice, the Contractor will provide the Consortium Executive Director with plans for transition. All provisions in the preceding paragraph also apply to unexpected Key Staff changes, except for the 30-Day notice.

We manage and deploy over 30,000 staff members across government and private sectors in the U.S., enabling us to staff the BenefitsCal M&O services contract with top talent. Our project planning is meticulous, with each phase designed to align with the overall project and staffing strategy, helping maintain schedule adherence and risk mitigation. We also comply with the Consortium's protocols for both anticipated and unanticipated staff changes, as detailed further below.

Addressing Expected Key Staff Changes

With an extensive history of projects here in California, we thoroughly understand the intricacies of staffing individuals who can get the job done and manage others for the right performance expectations. We have a well-defined process to manage, review, and inform the Consortium and BenefitsCal contractors of any staffing changes. Figure 3-7 highlights our key activities for proactively managing staff changes, and we further detail each step below.



CA_CON_BenefitsCal_JO-074287_2024-0009_2

Figure 3-7. Proactively Managing Staff Changes.

- **Planning and Monitoring:** PMO Lead Radhika Rastogi and Contract Manager Susanne Nielson continually assess and confirm full compliance with RFP requirements and scope of work, managing project schedules, scope, and resources effectively. We strive to minimize staffing turnover, particularly for key staff, by proactively addressing personnel issues, managing staffing transitions, and providing continuous and cross-role training. Additionally, we enhance team dynamics among the Consortium, State Sponsors, CWDA, County staff, and contractors.
- **Consortium Notification:** If the need for a planned staff transition arises, our Project Manager, Onur, gives written notification to Project leaders, including the Consortium Executive Director, within 30 calendar days. Deloitte's national staffing managers can quickly mobilize and deploy people with the right mix of skills and experience for specific project roles, pulling from across the United States.
- **Candidate Search:** We identify the necessary skills and experience for project staff based on the Scope of Work, role responsibilities, and comparable project experience. After determining these criteria, we collaborate with internal resource managers to compile a list of qualified candidates. Our management team then conducts pre-deployment interviews and checks alignment with candidates' professional goals to confirm their suitability for the project.
- **Consortium Candidate Vetting:** Onur provides two resumes for recommended replacements and two references to review for each key staff replacement. Within seven days of providing written notice of a transition, we provide and enact a transition plan describing the approach for handoff and knowledge transfer between the current and replacement staff, thereby minimizing the risk and impact to the project.
- **Execute Roll-on and Roll-off Processes:** Our onboarding lead orderly manages staff departures to reduce impacts to project activities. This effort includes conducting transition planning with scheduled and unscheduled staffing modifications, conducting transition and training of new staff with departing staff, and conducting exit interviews with departing staff to identify opportunities for improvement.

Addressing Unexpected Key Staff Changes

If a team member is unexpectedly absent, Onur notifies the Consortium Executive Director in writing within three business days and submits a transition plan within seven days. Onur also provides at least two resumes and references for any replacement staff, allowing the Consortium to interview and either approve or reject proposed replacements.

Project timelines and milestones are consistently met, with qualified interim resources covering roles until permanent replacements are found. In the event of a staff change, we facilitate smooth transitions by maintaining a reserve of coverage resources. This allows us to promptly fill roles temporarily, drawing from a pre-vetted candidate pool. Our leads orient potential new team members about their roles and the project specifics. The roles and responsibilities, including those of non-key staff, are detailed in the project staffing plan outlined in Attachment 13 – Staffing Worksheets, which is distributed to new project members.

3.1.1.4 Staff Performance

5.2.2.1.4 Staff Performance

The Contractor Staff will possess the skills and experience necessary to fulfil the responsibilities and requirements of this RFP. The Contractor will be responsible for identifying and correcting performance issues for its entire Staff (i.e., employees and Subcontractors). Should the Consortium discover performance problems with any Contractor Staff, the CalSAWS Executive Director will notify the appropriate Project Manager as soon as is reasonably possible. If the Executive Director requests removal of any BenefitsCal Staff person, the Contractor will immediately remove such Staff from the Project.

Skills and Experience Necessary to Fulfill Responsibilities

Please refer to Section 3.1. 2 – M&O Key Staff for detailed information on our proposed team skills and experience.

Identifying and Correcting Performance Issues

We proactively monitor staff performance across the team through internal reviews to mitigate issues early on and encourage our staff to bring their best in every instance. Onur has defined a careful set of measures to effectively manage team performance during the project by evaluating members on an ongoing basis. These measures help us maintain awareness of an individual’s contributions to the project and their overall performance. These measures are:

- **Work Quality:** Our leads and managers verify the accuracy and completeness of work products and deliverables, and regularly review team member roles and task execution. Bi-weekly performance check-ins allow staff to receive feedback and adjust as needed. Work quality metrics, which focus on standards, errors, waste, and rework, help identify staff who consistently meet Consortium and/or Onur standards.
- **Work Efficiency:** Leads and managers assess team members based on the timeliness of their work products, deliverables, and task completion. For instance, Donna might compare past time estimates against actual completion times, with significant deviations potentially resulting in one-on-one coaching or performance discussions. Efficiency metrics emphasize adherence to deadlines and help identify staff who consistently deliver on time, thereby minimizing project risks and delays.
- **Consortium and Team Feedback:** Onur inventories noteworthy actions of a staff member and perceptions of that staff member based on candid feedback from Consortium staff and team members. He gathers tangible feedback regarding whether a staff member is helpful to team members and counterparts and sets a tone of cooperation.

Throughout the contract, our management team engages in tactical activities (Table 3-6) to monitor and review staff performance.

Activity	Description
Bi-weekly Check-ins	<ul style="list-style-type: none">• Project Manager (PM) checks in weekly with each thread manager to track task assignment, completion, and impediments.• Managers and leads provide feedback on tasks that may be at risk of being delayed or blocked.

Activity	Description
	<ul style="list-style-type: none"> PM supports team leads in collaborating across threads and with the appropriate Consortium or Consortium contractor team. PM gets feedback from team leads on how their staff are performing and any staff-specific concerns. Team leads check on their staff to confirm assigned work is on track to be completed and provide support in helping close activities in a timely and accurate manner.
Quarterly Performance Reviews	<ul style="list-style-type: none"> PM meets with team leads to review and detail expectations by providing measurable and achievable goals. PM explains the rewards for meeting the goals and the consequences for failing to reach defined targets. PM works with team leads to provide formal feedback to team members within the Deloitte leadership team. Deloitte uses a quarterly "snapshot" program to evaluate staff on pre-defined dimensions of client-focused performance. Team leads meet with their staff to review assigned tasks and duties and explain their role in the larger scope of activities assigned to their thread.
Documented Performance Concerns, with Defined Mitigation Plans	<ul style="list-style-type: none"> Manager/Lead communicates a verbal warning directly to staff who violate a company or project rule; identifies mitigation strategies; documents the infraction with the employee's name, date, and time; and places a copy in the employee's personnel file within Deloitte HR applications or sends a copy to teammate firms.
Employ Appropriate Disciplinary Action, Based on Performance and Severity	<ul style="list-style-type: none"> PM proceeds with appropriate disciplinary action, based on repeated violations of company rules. The same may apply if overall productivity and performance of the staff member is seen as deteriorating. Consequences reflect the infraction, but could include retraining, probation, demotion, loss of hours, or termination. The CalSAWS Executive Director is informed before such actions are taken against a member of the Deloitte Team.

Table 3-6. Performance Review Activities Carried Out by the Deloitte Leadership Team.

These simple monitoring, mitigation, and escalation procedures provide clarity for our staff regarding expectations for performance and behavior. We provide rules that are easy to follow and easy to enforce, especially when the team has clear, consistent, and open communications. Lastly, we are careful to recruit and select individuals of the highest caliber, making it rare that these disciplinary practices need to be applied.

Procedures for Consortium Identified Performance Issues

If the Consortium reports performance issues, Onur verifies and addresses them, aiming to resolve issues before they escalate to the Executive Director. The Deloitte Team proactively manages performance, documenting concerns and creating mitigation plans during check-ins and reviews. If issues persist, Deloitte Leadership takes corrective actions based on the severity of the problem.

If the Executive Director requests removal of a team member, Onur verifies the issue resulting in the request. He then initiates the staff roll-off procedures and staff identification procedures described in Section 3.1.1.3–Contractor Staff Changes.

3.1.1.5 Staffing Worksheet (S2)

5.2.2.1 Staffing Approach

S2

The Bidder will complete Attachment 13 – Staff Loading Worksheets describing the roles and level of effort (hours) to provide BenefitsCal Services.

The completed Staffing Worksheets, in the required format, are provided separately as 'Vol. 1, Sect. 5, Att. 13: Staff Loading Worksheets-Deloitte' within Volume 1–Section 5 Required Attachments.

3.1.2 Key Staff

5.2.2.2 Key Staff

Bidders submitting a Proposal must include the following nine (9) Key Staff.

1. BenefitsCal Project Manager
2. BenefitsCal Project Management Office Lead
3. BenefitsCal Transition-In Lead
4. BenefitsCal Application Manager
5. BenefitsCal Product Manager
6. BenefitsCal User Centered Design Lead
7. BenefitsCal Test Manager
8. BenefitsCal Security Manager
9. BenefitsCal Public Communications Lead

Key Staff minimum qualifications requirements are contained in Attachment 1 – Statement of Work. Key Staff skills and abilities will be scored according to Section 8 - Evaluation.

Our Deloitte BenefitsCal Management Team, shown in Figure 3-8, has been carefully selected based on their professional background and years of HHS experience, BenefitsCal Experience, and West Coast location. Each has experience working either directly with California Counties and/or supporting other state HHS agencies in their area of specialty that aligns with BenefitsCal needs.

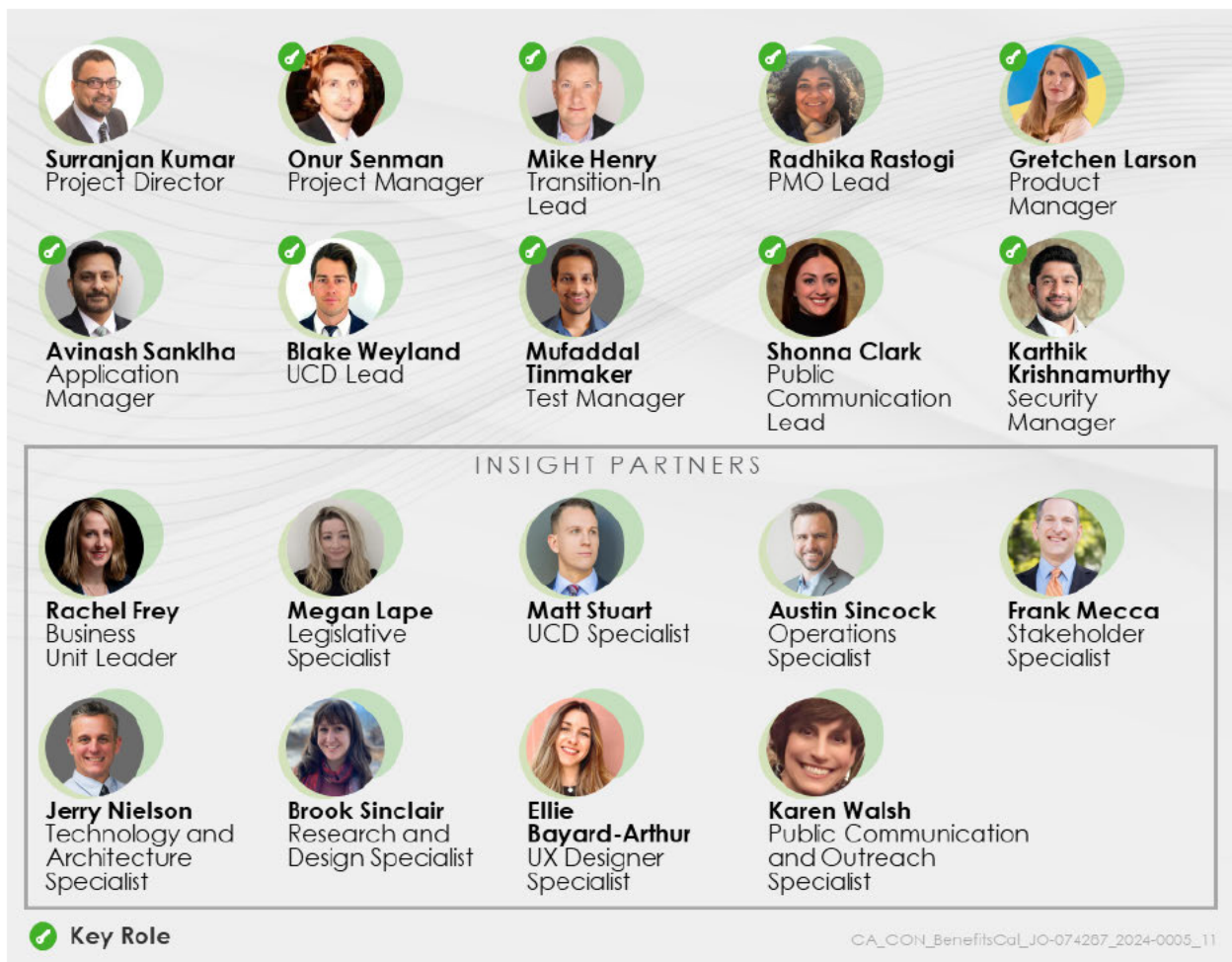




Figure 3-8. The BenefitsCal Leadership Team.

3.1.2.1 BenefitsCal Project Manager

Attachment B10 Requirements: S3-S7



ONUR SENMAN
BenefitsCal Project Manager




I look forward to putting my 12+ years of E&E and HHS experience to work to make the Consortium successful in all its key initiatives, helping Counties support Californians in need.


Why is Onur right for this role?

Onur is a highly skilled professional with over 16 years of technology experience, primarily in Health and Human Services (HHS). He has excelled in managing and implementing technology solutions across multiple states, including Arkansas, Georgia, Montana, Oregon, Indiana, and California. Onur has proven expertise in integrating eligibility and self-service portals. He successfully led the BenefitsCal functional team from initial implementation to a go-live event in LA County and managed the migration of the CalWIN counties to BenefitsCal as the project manager. His role involved overseeing cross-functional and technical teams, coordinating with stakeholders, and confirming that project deliverables met high standards. Onur's extensive experience and strategic oversight as a certified project manager make him a valuable asset, especially in roles demanding deep knowledge of HHS and robust technology solutions. His leadership has been instrumental in launching a tailored eligibility system for millions of Californians, available in 20 languages and providing a unified application point for multiple state programs. Onur is a certified Project Management Professional (PMP).

3.1.2.2 BenefitsCal Project Management Office Lead



RADHIKA RASTOGI
BenefitsCal PMO Lead




As a PMO Lead, I seamlessly integrate continuous learning and innovative thinking to keep projects aligned, efficient, and effective. With a proactive blend of emotional intelligence and strategic foresight, I lead teams to not just meet, but exceed business objectives, ensuring every project journey is a blueprint for success.

Why is Radhika right for this role?


Radhika has demonstrated exceptional leadership in driving diverse project teams towards achieving strategic objectives. Her management style is results-oriented, focusing on delivering high-quality outcomes. Radhika brings over seven years of robust experience in PMO project management, supporting government clients across different jurisdictions. Across various efforts, she has consistently driven project success and business growth. She is a certified Project Management Professional (PMP) and has advanced knowledge and skills in project management principles and practices. She is

skilled in formulating strategic plans that align with business goals so that complex requirements are translated into actionable deliverables.

3.1.2.3 BenefitsCal Transition-In Lead



MICHAEL HENRY
BenefitsCal Transition Lead



As I did with the CalHEERS and DMDC transitions, I'll bring a repeatable and transparent approach that enables a smooth transition to your next vendor.


Why is Mike right for this role?

Mike exceeds the skills, qualifications, and requirements for this project position. He successfully performed operational transition activities on three large and complex IT system projects for state and federal clients. Most recently, he has led multiple large-scale transitions of large application portfolio and IT service management programs from incumbent vendors including from the CalSAWS incumbent vendor at CalHEERS and in the State of Texas. He is familiar with their processes, approach, and style and has navigated challenges such as documentation gaps and technology stack complexity. Mike is planned to serve as the CalSAWS M&E Transition Manager for Deloitte and will have gained valuable CalSAWS exposure and experience from that effort. Mike brings his extensive experience providing strategic guidance to large-scale system integration projects to the role of Transition Manager. Overall, Mike has over 20 years of experience in large and complex IT implementations. The transition durations for his projects are a testament to his transition delivery experience.

3.1.2.4 BenefitsCal Application Manager



AVINASH SANKHLA
BenefitsCal Application Manager



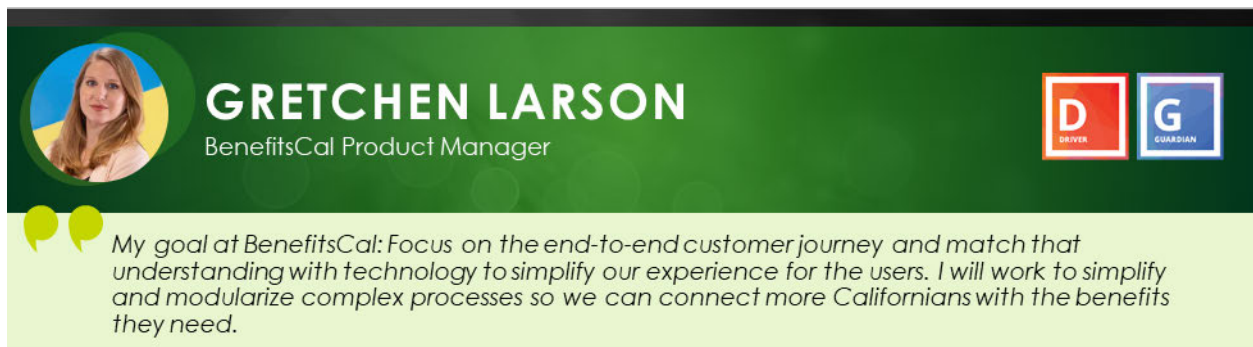
I look forward to applying my experience and expertise to design, manage, and support the enhancements of the ongoing modernization of BenefitsCal application for CalSAWS. Utilizing strategic design thinking while working with the Consortium, I am excited to be a part of the CalSAWS journey and will strive to provide continuous improvement efforts.

Why is Avinash right for this role?

Avinash is a seasoned leader in enterprise technology transformations, with a specialized focus on Cloud implementations. His expertise spans managing and supervising M&O teams, enterprise workloads, applications, and cloud infrastructure projects. Avinash has demonstrated a robust capability in leading diverse teams that support the maintenance and optimization of enterprise systems, securing high performance and reliability. His extensive experience is particularly notable in the context of integrated eligibility systems specific to the State of Hawaii's Benefit,

Employment, and Support Services Division (BESD) where Avinash played a pivotal role in M&O services and enhancing the MedQuest and KOLEA systems. These projects involved complex data center and platform infrastructure along with integrations that required a deep understanding of both the technical and functional aspects within the realm of specific regulatory requirements. Avinash's strategic leadership and deep technical expertise make him an exceptionally qualified candidate for roles that demand profound technical knowledge and a proven ability to steer significant IT projects and innovations, especially in environments requiring integrated eligibility solutions.


3.1.2.5 BenefitsCal Product Manager



Why is Gretchen right for this role?



Gretchen exceeds the skills, qualifications, and requirements for this project position. She has over five years of technical and functional product management experience serving in product manager type roles across the public sectors. She has overseen efforts to discover new user needs and incorporate ongoing feedback to iteratively improve products over time. She is experienced in UX design and managing both technical and design teams. Gretchen confirms that User-Centered Design (UCD) processes and User Experience (UX) methodologies are applied in the product development cycle and that input from users and other stakeholders is included in UCD activities throughout the design and development process. Gretchen can identify and proactively bring forward solutions that provide the most efficient and effective engagement of users, streamline service delivery, and bring the most value to users. She prioritizes enhancements to create the most value and align with the overall product vision. Gretchen has over 13 years of technology consulting experience in leading, planning, and implementing strategic solutions for critical IT applications.

3.1.2.6 BenefitsCal User Centered Design Lead



BLAKE WEYLAND

BenefitsCal UCD Lead



As the UCD Lead, I bring an unwavering commitment to enhancing the customer experience by making online government services accessible to all, regardless of their digital literacy. My extensive background in User Experience Design and Research has prepared me to address the nuanced needs of both employees and customers, ensuring a holistic and inclusive approach. I am particularly excited about entering a new phase with BenefitsCal, where I can apply a wealth of UX and CX insights to refine and elevate the service design, fostering more meaningful interactions and integrations across all stakeholders.

Why is Blake right for this role?

Blake is a distinguished UX Design Lead with extensive experience exceeding five years, specializing in UCD across both public and private sectors. His prior role as the Design Manager for CA CARES underscores his ability to enhance user interfaces while maintaining a strong focus on accessibility, inclusivity, and ethical design practices. Blake has led the design for major releases, like enhancing user experience and interface of the Child Welfare portal and guiding the entire User-Centered Design (UCD) processes for Genetic Disease Screen Program's (GDSP) modernization process. From discovery through prototyping, From User interview to user testing, from focus groups to training demos, from requirements gathering to implementation, He has delivered a standout solution for the California Department of Public Health, leveraging full cycle automation and results from extensive usability studies. Through his leadership, Blake has significantly elevated the user experience of many different projects, enhancing user satisfaction and engagement. His commitment to ethical and inclusive design has set a high standard for accessibility and influenced broader design practices within her projects.

3.1.2.7 BenefitsCal Testing Manager



MUFADDAL TINMAKER

BenefitsCal Testing Manager



I will work closely with my Consortium counterpart to implement quality assurance processes that are cost effective, repeatable, automated, and transparent, delivering a high performing BenefitsCal solution that is designed for end user needs.

Why is Mufaddal right for this role?

Mufaddal is a seasoned Testing Manager with over 13 years of experience in IT systems testing, stakeholder management, and contractor oversight. His extensive experience includes leading the testing efforts for the BenefitsCal project since it began in 2020, demonstrating a strong commitment to quality and continuous improvement. He led

the comprehensive testing efforts encompassing system, integration, User Acceptance Testing (UAT), and regression phases. He oversaw the development of an automated testing suite to verify that there were no regression issues and confirm ADA compliance and accurate language translation validation. He maintained a notably low defect rate in production due to meticulous testing practices and quality focus. His leadership in testing has directly contributed to the successful deployment of robust IT systems with minimal disruptions and high user satisfaction rates. Mufaddal's focus on precision and excellence in testing practices has set benchmarks for quality for the projects he has managed.

3.1.2.8 BenefitsCal Security Manager



KARTHIK KRISHNAMURTHY
BenefitsCal Security Manager

Cyber threats continue to multiply for systems like BenefitsCal. I'll manage the full capabilities of Deloitte to keep BenefitsCal infrastructure and data safe from threats.

Why is Karthik right for this role?

Karthik is a seasoned cybersecurity expert with more than 14 years of dedicated experience in the field and a six-year track record with the State of California. As a Certified Information Systems Security Professional, his extensive background in designing IT safeguard mechanisms, strategizing data protection plans, and leading statewide cybersecurity initiatives makes him an ideal candidate for this project position. Karthik led the BenefitsCal platform from design to implementation, maintaining a record of zero security incidents caused by BenefitsCal. He has also led integration efforts with other consortium systems, such as ForgeRock. Karthik's leadership has not only protected critical state systems but also confirmed their smooth integration and operation in a multivendor environment. His ability to merge robust security measures with user-friendly system design has significantly contributed to the operational success and reliability of state-managed digital platforms.

3.1.2.9 BenefitsCal Public Communication Lead



SHONNA CLARK
BenefitsCal Public Communications Lead

Collaborating closely with the joint leadership team, Consortium, and external stakeholders, I am committed to leading a strategic and comprehensive marketing and public relations campaign for BenefitsCal. Together, we will harness our collective expertise and insights to craft a campaign that not only resonates with all stakeholders but also robustly amplifies our mission and impact across all channels.

Why is Shonna right for this role?

Shonna brings 17 years of experience in communications and marketing, tailored to the needs of government sectors and public relations. Her extensive background spans state, civilian, higher education, and defense sectors, making her a strongly qualified candidate for this project position. She developed and executed comprehensive marketing strategies across various media. She managed complex message development and brand management initiatives. She is an expert in crafting strategic approaches that align with organizational goals and enhance public perception. Shonna's strategic initiatives have significantly raised awareness for programs aimed at benefiting vulnerable populations in the U.S. Her efforts have led to increased program support and recognition and contributed to the societal impact of these initiatives.

3.1.2.10 Key Staff Client References

5.2.2.2.1 Key Staff Client References

The purpose of the Key Staff reference requirements is to provide the Consortium with the ability to assess Key Staff experience in supplying similar or relevant services to those identified in this solicitation. Key Staff Client References contained in this section must be met and documented according to Section 6 - Proposal Structure and Submission. The Consortium may contact references listed to verify the information provided by the Bidder. Any conflicting information may result in the Proposal being deemed nonresponsive.

The completed and signed forms for the two individual reference checks for all key staff, in the required format, have been provided separately as "Attachment 11–Staff Reference Forms" in Section 6–Business Proposal Attachments. We interpret Key Staff References as referring to the Individual References submitted via Attachment 11 forms, separate from Company Contacts listed in Attachment 10.

3.1.3 Additional Insight Partners and Specialists

Deloitte brings additional partners and specialists to the BenefitsCal M&O Services contract to supplement, support, and round out the M&O key staff team. These roles include Deloitte professionals with strong backgrounds in HHS, national leadership, and deep experience in their key skill areas. Our Deloitte specialists add significant value and provide vital skills to enable project success, lower the overall risk profile of the project, and support BenefitsCal and the M&O Services contract. 3-21 through 3-24 outlines our project partners and specialists identified for project success.



Why is Rachel right for this role?

Rachel brings over 25 years of experience in working with commercial, state, and local HHS agencies. She serves on the national HHS leadership team, and her past positions include leading Deloitte's State and Local HHS Program Integrity Offering and HHS Analytics. Rachel has led efforts for eight E&E technology and operational redesign efforts, including California, Nevada, Louisiana, the District of Columbia, Pennsylvania, Wisconsin, New Mexico, and Indiana. Rachel has been serving as the Project Executive for Deloitte for CalSAWS-related engagements and is the Client Business Unit Leader for

Human Services and Education in California. She started her career supporting the implementation of Los Angeles LEADER and moved on to leading the application development for WDTIP and later to ISAWS.



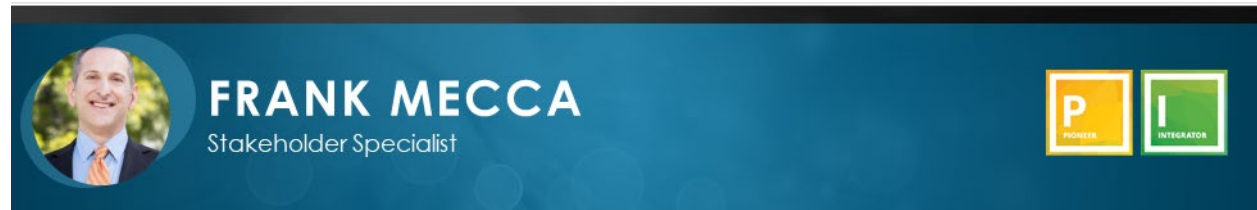
Why is Megan right for this role?

Megan has 15+ years of experience in both the public and private sectors, where she has effectively developed and advocated for policy and legislative priorities impacting health and human service programs. Her experience includes roles such as Federal Legislative Coordinator at the California Department of Social Services and Director at the American Public Human Services Association, where she led national efforts to integrate public health and human services. Megan's proven track record in government relations and her ability to represent and negotiate across diverse platforms, such as the American Public Human Services Association and the National Governors Association's Human Services Advisory Institute, demonstrate her strong communication skills and her deep understanding of federal regulations and Congressional legislation. Additionally, Megan has expertise in federal regulations and Congressional legislation spanning human services (e.g., child welfare, childcare, TANF, SNAP, eligibility & enrollment) making her exceptionally qualified to handle complex communications and stakeholder engagement in the Communication Specialist role, especially tailored to BenefitsCal.



Why is Matt right for this role?

Matt Stuart is a UX leader with over 15 years of experience in fostering the creative design of intelligent interactive technology experiences. Currently serving as the Consumer Experience Lead on CalHEERS, Matt's skill set enables him to assemble multidisciplinary UX teams and develop custom systems and iterative design processes. His blend of leadership, design acumen, and team-building capabilities can make him an excellent UCD Specialist to the BenefitsCal team seeking to enhance user experience.



Why is Frank right for this role?

Frank Mecca served as CWDA's Executive Director from October 1991 - December 2020. During this time, he helped establish CWDA as a leading advocacy and policy organization in public human services. Under Frank's leadership, the association was instrumental in the development of significant human services programs and policies, including helping shape the CalWORKs program, creating the Adult Protective Services program, and advocating for significant child welfare reform efforts such as extending foster care support to youth after age 18. Frank was Vice Chairman and a board member of the California Budget & Policy Center, as well as a member of the California Child Welfare Council. He is a former president of the National Association of County Human Services Administrators. Frank brings to our team a view from the Counties and experience navigating the complex SAWS stakeholder environment.



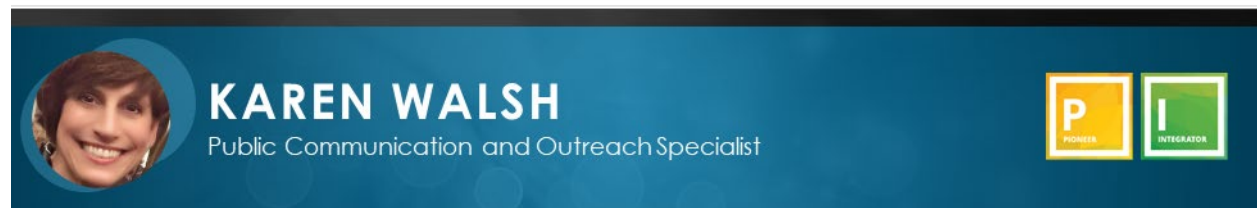
Why is Austin right for this role?

Austin Sincock is an ideal candidate for the BenefitsCal Technical Specialist role, with over 15 years of experience managing complex technical projects in both commercial and governmental sectors. His expertise in the full System Development Life Cycle (SDLC), demonstrated by his work with entities like [REDACTED], aligns with California's technical needs in public welfare systems. Austin has led Agile transformations at the [REDACTED], showcasing his ability to innovate and adapt frameworks that enhance operational efficiency and system reliability—crucial for the BenefitsCal initiative. His skills in Enterprise Java and web-based applications significantly benefit California's benefits administration platforms. Additionally, as a published author and recognized expert in Java/SAP integration, Austin's insights and strategies add substantial value to the BenefitsCal program. His proven track record in managing projects and strategic implementations in complex environments positions him well to support California's public sector technology advancements.



Why is Jerry right for this role?

Jerry has more than 17 years of experience in Health and Human Services. Jerry has been working on SAWS projects starting with C-IV, then onto LRS and now with BenefitsCal. He currently leads efforts with CalSAWS and the EBT vendor (FIS) as integration partners for exchanging information with BenefitsCal. Jerry also drives BenefitsCal performance testing and leads presentations to the architecture review board and facilitates the processes around FinOps. He has experience working in other states as well in Alaska, Kansas and Kentucky. Bringing multi-state experience to California brings fresh perspectives around managing and modernizing CalSAWS technology. In Jerry's current role with BenefitsCal he led the effort to implement a serverless, cloud native portal that is reflective of the future state where the Consortium would like to move. As Jerry will be transitioning to CalSAWS he will provide guidance to the BenefitsCal team in an advisory capacity only.



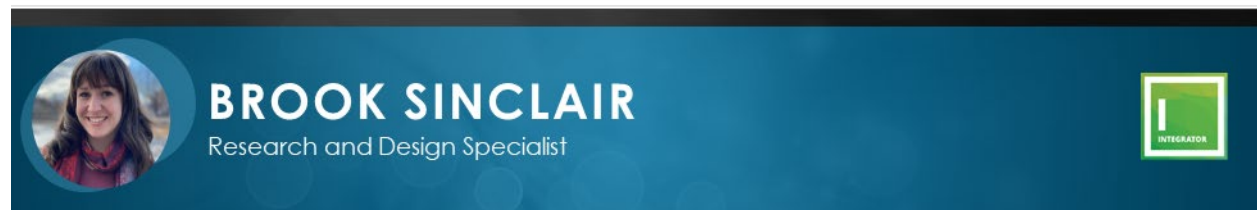
Why is Karen right for this role?

Karen has over 20 years of experience in strategic and crisis communications, specializing in large-scale IT and business transformation projects that often attract attention from elected officials, auditing agencies, and the media. Since joining Deloitte in 2010 from a PR firm in Pennsylvania, where she previously led the public affairs and crisis communications practice, Karen has been instrumental in shaping communication strategies across various high-profile projects. Her expertise as a former gubernatorial press secretary and political strategist has made her a trusted Specialist to many Deloitte clients, enhancing the firm's engagements across 30 states, Puerto Rico, and Washington DC. Karen's extensive experience in public sector projects is complemented by her ability to navigate complex political landscapes and manage sensitive information, making her an invaluable asset in guiding projects toward successful outcomes. Her strategic insights bring fresh perspectives to each project, driving innovation and modernization in public sector communications.



Why is Ellie right for this role?

Ellie is a highly qualified candidate for the UX designer role, with significant experience as the UX Design Lead for the BenefitsCal self-service portal. She is enthusiastic about rejoining BenefitsCal, now equipped with additional certifications in UX Design, Research, Prototyping, User Testing, and Data Analysis from EdX. Her comprehensive understanding of the California landscape and her critical contributions to major BenefitsCal releases—overseeing both functional and design team workflows and directing UCD/UX Design lifecycle activities such as discovery research, prototyping, and usability testing—position her to elevate the solution's design and user experience substantially. Utilizing analytics and customer feedback, Ellie has consistently enhanced client satisfaction and overall user engagement. With over five years of UCD experience across various sectors, Ellie advocates for inclusive, accessible, and ethical design practices to enhance user experiences universally.



Why is Brook right for this role?

Brook brings extensive experience in multi-stakeholder collaboration, adept at transforming complex policy information into concise, user-friendly content. She has improved the user engagement strategy for various Integrated Eligibility projects, enhancing the accessibility and understanding of Medicaid, SNAP, and TANF benefits. Brook's development and execution of a Customer Experience (CX) Measurement plan highlights her commitment to outstanding user experiences. Her approach incorporates best practices in Diversity, Equity, and Inclusion, making User-Centered Design activities inclusive and equitable. Additionally, her leadership in documenting and refining the HMO enrollments process for a State's Department of Health Services project has been recognized for its clarity and effectiveness. Brook's leadership in developing a user research approach for the State's Integrated Eligibility System Consortium has crucially informed design concepts that resonate with multiple teams.

3.2 Staffing Experience Details

6.3.3.5.2 Staffing Experience Details

The Bidder shall provide Key Staff résumés and qualifications for all Key Staff in accordance with the format prescribed in Attachment 10 – Staff Resumes and Qualifications.

The Bidder shall provide two (2) Individual Reference Checks for all Key Staff in accordance with the format prescribed in Attachment 11 – Staff Reference Form.

3.2.1 Staff Resumes and Qualifications

The completed forms, in the required format, have been provided separately as Attachment 10 – Staff Resumes and Qualifications within Section 5 – Business Proposal Attachments.

3.2.2 Key Staff Client References

The completed and signed forms for the two individual reference checks for all key staff, in the required format, have been provided separately as Attachment 11–Staff Reference Forms within Section 5–Business Proposal Attachments.