

Firm Qualifications

Section 2

RFP Reference: 6.3.3.4 Section 2 – Firm Qualifications

The Firm Qualifications Section shall provide a narrative with information that provides the Consortium with a basis for determining Contractor financial and overall capabilities to undertake a contract of this size and complexity. Bidders will respond to all Firm Qualifications contained in Section 5.2.1 – Firm Qualifications.

California has a long history of delivery success in the Health and Human Services (HHS) field—from the initial implementation of NAPAS to the latest migration to a single statewide system, CalSAWS. Today, California faces increasing budget pressures, more customers seeking 24x7 access to services, more cyber threats, and more technologies like AI that present complex, new opportunities. In addition, Californians want more engagement and transparency as they seek critical services to address their food, health, and overall sufficiency needs. Stakeholder engagement in CalSAWS public facing solutions has exponentially increased over the last few years. All the while, State and federal HHS policies continue to evolve. This is not the future. This is now. It demands experience day one in getting the job done right in and for California.

California needs a vendor partner with hands-on BenefitsCal knowledge and a history of evolving California and other state Eligibility and Enrollment public portals to accelerate and advance BenefitsCal's strong foundation. A collaborator who relates to your Counties, Customers, CBOs and other relevant stakeholder and anticipates their needs. A Contractor that continuously engages with the BenefitsCal stakeholder ecosystem to make sure that voices are represented, and ideas are shared. A vendor that engages their technology alliances to bring resolution to challenges quickly and brings new capabilities to deliver changes faster to BenefitsCal. One that stands side by side with you when challenges arise, including challenges in the broader CalSAWS ecosystem, to bring additional perspective and support.

Section Highlights

- Deloitte is a nationally acclaimed leader in developing and upgrading HHS self-service portals and Eligibility and Enrollment (E&E) systems, with 45+ years of experience.
- We are the original BenefitsCal designers, implementing a state-of-the-art solution that has supported 4.5M+ households.
- Deloitte offers exceptional User-Centered Design (UCD) capabilities that we have leveraged for 40 federal and 35 state & local projects.
- Deloitte is a certified AWS Public Sector Partner. We have been certified with 17 AWS Service Validations and certified in 29 AWS Competencies.
- We have supported California clients and communities for over 100 years with 11 California offices and 550+ practitioners in Sacramento alone. We are 100% committed to the success of BenefitsCal.
- According to Gartner Market Share report Deloitte has been ranked #1 in security consulting services since 2011

Having a Contractor that brings relationships with not-for-profit organizations who support Californians seeking services is crucial for the expanded adoption and perception of BenefitsCal. An organization that can bring the breadth of capabilities needed under one roof, including an in-house ad and experience agency and the #1 ranked security consulting services provider according to Gartner, can catapult BenefitsCal and California service delivery into the future.

Deloitte is that partner.

As the incumbent, Deloitte already has you covered as you embark on the journey to meet your vision for expanding the adoption of a performant, reliable, secure BenefitsCal through an experience that is centered around empathy, ease, equity and inclusion.

How this Section is Organized

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In this section, we highlight our BenefitsCal-aligned experience, and the value Deloitte brings as your BenefitsCal vendor. We have a vast domestic and global footprint and a dedicated and experienced Government & Public Services (GPS) sector. As a nationally acclaimed leader in Health and Human Services (HHS) self-service portals, mobile solutions, and Eligibility and Enrollment (E&E) systems, we bring the experience needed to maintain and operate the BenefitsCal solution. We have served California's clients and communities for over 100 years, with deep roots that help us understand the needs of BenefitsCal customers.

This section highlights the experience and successes we have achieved as the BenefitsCal incumbent vendor, an overview of the firm's organization, and the additional relevant experience we bring in cyber risk and security services, communications and marketing capabilities, and strategic technology alliances. We provide details on experience related to HHS portals and mobile solutions, applying User-Centered Design (UCD) principles, and performing User Experience (UX) activities, performing application maintenance and system modifications with React/Java and AWS cloud architecture. In this section, we also address the firm reference and firm financial resources requirements.

Our Global and U.S. Footprints

With more than 457,000 resources worldwide, Deloitte Touche Tohmatsu Limited (DTTL) member firms deliver services in audit, risk and financial advisory, tax, and consulting in 725 offices in more than 150 countries and territories. We work with clients across the world to provide services and share evidence-based outcomes. DTTL—of which Deloitte LLP is the U.S. member firm—is the largest private professional services network in the world, recording revenues of \$64.9 billion in Fiscal Year (FY) 2023. Deloitte LLP (including its subsidiaries) is the largest private professional services provider in the U.S. with over 171,000 employees and \$32.7 billion in annual revenues in FY 2023. Our extensive reach allows us to tap into unique relationships, lessons learned, leading practices, and novel approaches both domestically and internationally.

DISTINGUISHING FACTORS



- Deloitte is the largest professional service provider in the world (based on global revenues and headcount).
- Deloitte is the largest professional services firm in the U.S. in terms of revenue and headcount.
- Deloitte is in 106 U.S. cities with 171,000 people including 6,500 partners, principals, and managing directors.

Our Government & Public Services Footprint

As part of Deloitte LLP, we have a dedicated practice serving government and public services clients. Our GPS professionals understand that the mission matters and are dedicated to the support of public service. For more than a century, we have worked with our government clients to help build stronger, healthier, and more resilient communities. Whether our clients need innovative technologies, strategic advice, or transformational ideas, we bring Deloitte's depth and breadth to connect them with

the trusted professionals, resources, alliance partners, and solutions they need to serve their people more effectively and efficiently. Figure 2-1 shows Deloitte's GPS footprint.



Figure 2-1. Deloitte GPS Footprint.

Deloitte is consistently recognized as a leader in system integration and business transformation by Forrester, Gartner, and others in government services consulting. As a trusted advisor to many of the largest government agencies, we understand the intricacies clients must navigate and the growing pressures they face: the need to create service delivery systems with humans at the center, protect sensitive information, and stay current with the latest technology and business practices to operate more effectively and deliver higher value to customers.

We have delivered tremendous impact across the spectrum of the government and higher education sectors, some of which are depicted in Figure 2-2.

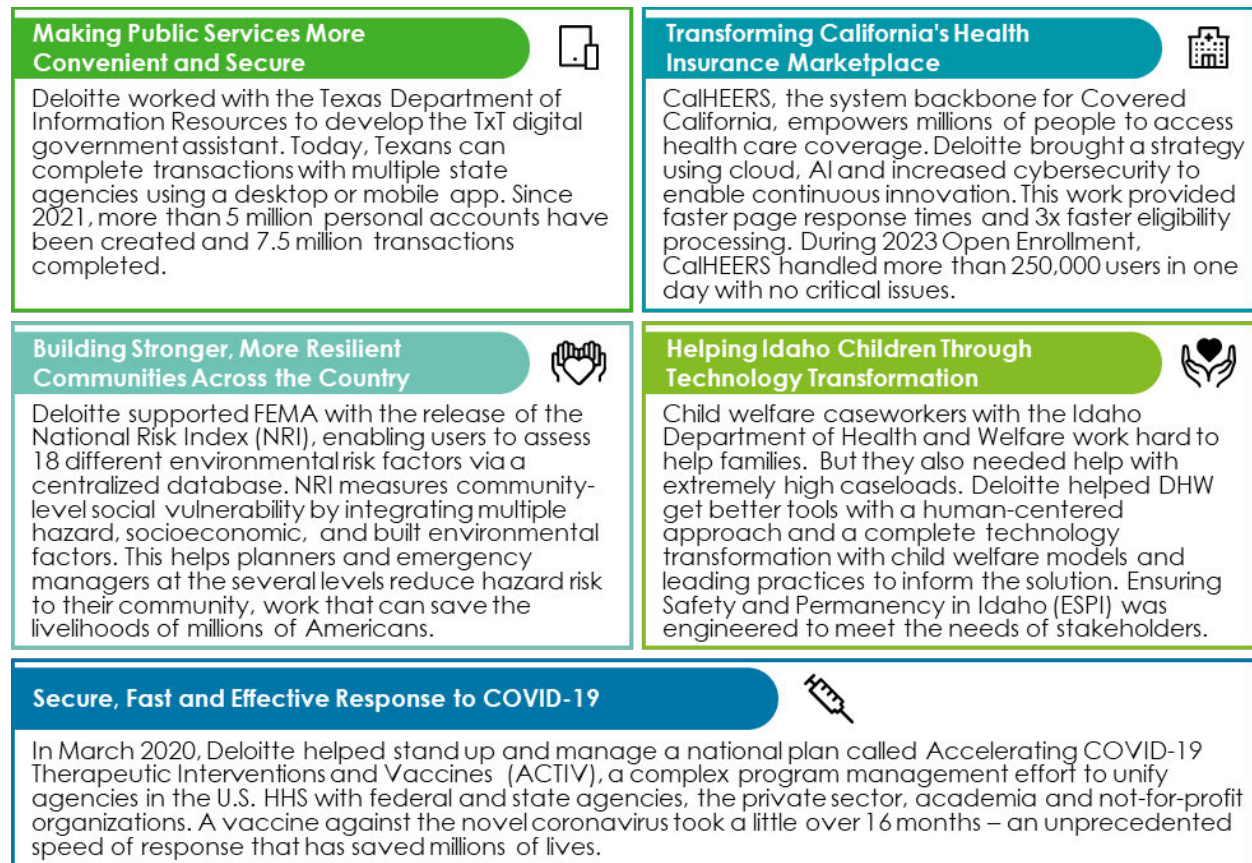


Figure 2-2. Making an Impact that Matters.

Our Experience with HHS

Deloitte is a nationally acclaimed leader in developing and upgrading HHS Supplemental Nutrition Assistance Program (SNAP), Medicaid, child care, Disaster SNAP, and Temporary Assistance for Needy Families (TANF) self-service portals, mobile solutions, and Eligibility and Enrollment (E&E) systems, with over 45 years of continuous experience. We have been providing, maintaining, and operating HHS solutions in 49 states, the District of Columbia, Puerto Rico, Canada, and the United Kingdom. With this broad community of implementations, our teams and clients are able to share solutions that allows them to accelerate solution delivery and thereby realizing benefits (e.g., customer outcomes) faster. Most recently the state of Florida requested to transfer the BenefitsCal solution to enhance an already highly adopted self-service solution in Florida with the aim to increase user experience for Floridians as they access crucial services and modernize their technology platform. Deloitte has also most recently received two intents to award where BenefitsCal is the planned accelerator for their public facing portals. Figure 2-3 provides an overview of our extensive experience.

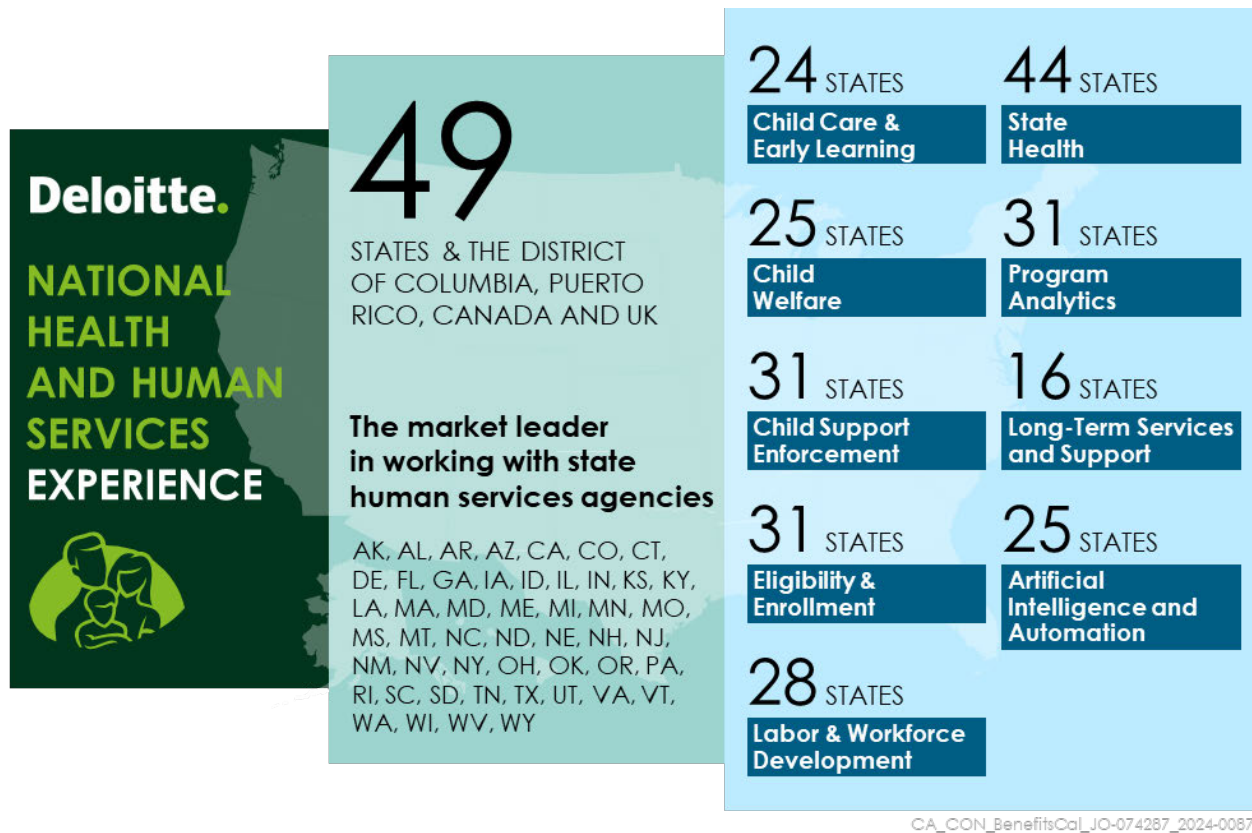


Figure 2–3. Deloitte’s Market Leading Health and Human Services Experience.

Our HHS Experience in California

Deloitte has delivered HHS projects in California for more than 45 years. Our deep roots in California, combined with our HHS experience across the country, allow us to understand your goals and ambitions for BenefitsCal—increasing efficiency, continuous improvement to stakeholder engagement and communication processes, Expanding data analytics capabilities, Ongoing innovation and staying current with the latest technology and business practices.

We continue to successfully meet the evolving needs and goals of various California departments and agencies through our sustained collaboration. With 11 offices throughout the state, more than 9,000 Deloitte employees live and work here. Deloitte combines deep industry knowledge with a breadth of services that instills confidence in our state clients and helps them provide responsive, high-quality service to their customers.

We have successfully completed projects with over 30 agencies and departments and all of California's 58 Counties during our long-standing relationship with the State. Our services have included project management and change leadership as well as systems design, development, implementation; advertising and marketing; customer experience measurement; training; communication management; cyber risk; program integrity; and M&E. Figure 2-4 illustrates examples of our commitment to the State of California.

Why does it matter? It's simple—it enables us to enable you to operate more effectively and deliver higher value to Californians.

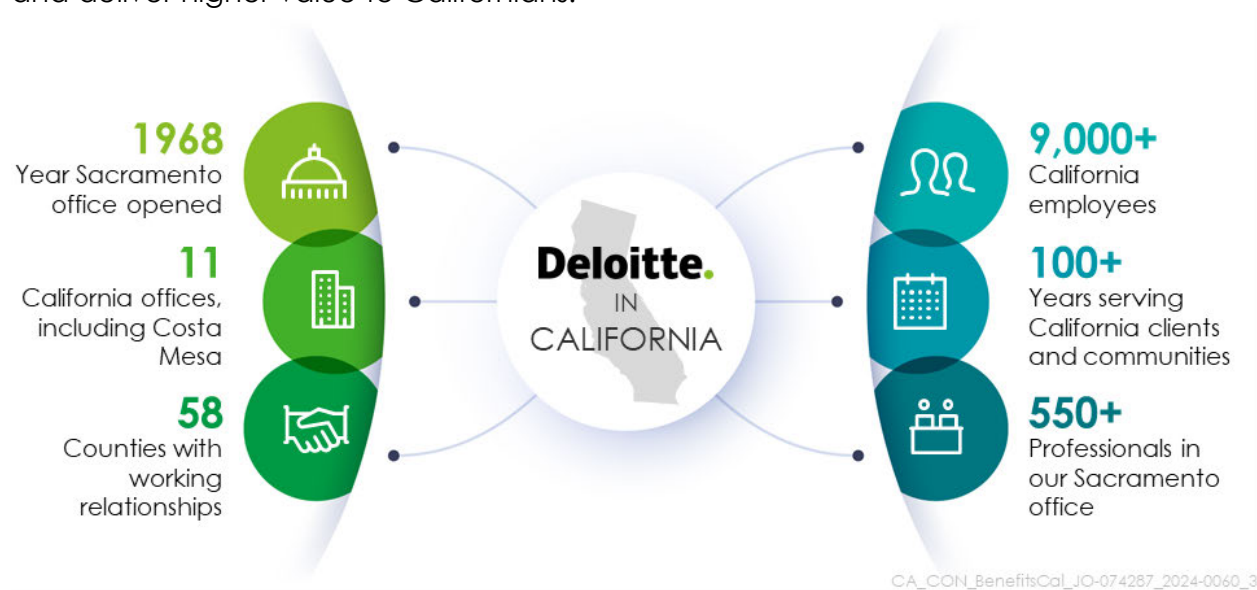


Figure 2-4. Deloitte's Commitment to the State of California.

2.1 Firm Experience Details

6.3.3.4.1 Firm Experience Details

Bidders will provide details of Prime Contractor firm experience relevant to the proposed BenefitsCal Services within the form in Attachment 8 – Firm Qualifications. A concise but thorough description of relevant experience is desired.

The Contractor shall also provide a general narrative description highlighting the Contractor's BenefitsCal Services experience and capabilities.

The Contractor shall provide a firm organization chart. If the firm is a subsidiary of a parent company, the organization chart must be that of the subsidiary firm. The chart must display the firm's structure and the organizational placement of the BenefitsCal Project. The organization chart must include names and an effective date. The Contractor shall supply any additional information not already presented in this Section, which the Bidder believes to be relevant to the Consortium's assessment of the Contractor's experience with regard to the specifics of this RFP.

The Contractor shall provide two references using the Attachment 9 – Firm References form. Each reference must clearly indicate the reference entity.

On the following pages, we provide a general narrative of our BenefitsCal services experience and capabilities, firm organization details, and relevant firm experience. We describe the features and accomplishments of reference projects as they relate to Requirements F1-F4. Completed Firm Qualifications, in the required format, is provided separately as “Vol 1 Sect 5 Att 8 Firm Mandatory Qualifications–Deloitte” in Section 5 along with completed and signed Firm References, in the required format, labelled “Vol 1 Sect 5 Att 9 Firm References–Deloitte” within Section 5.

Relevant Experience

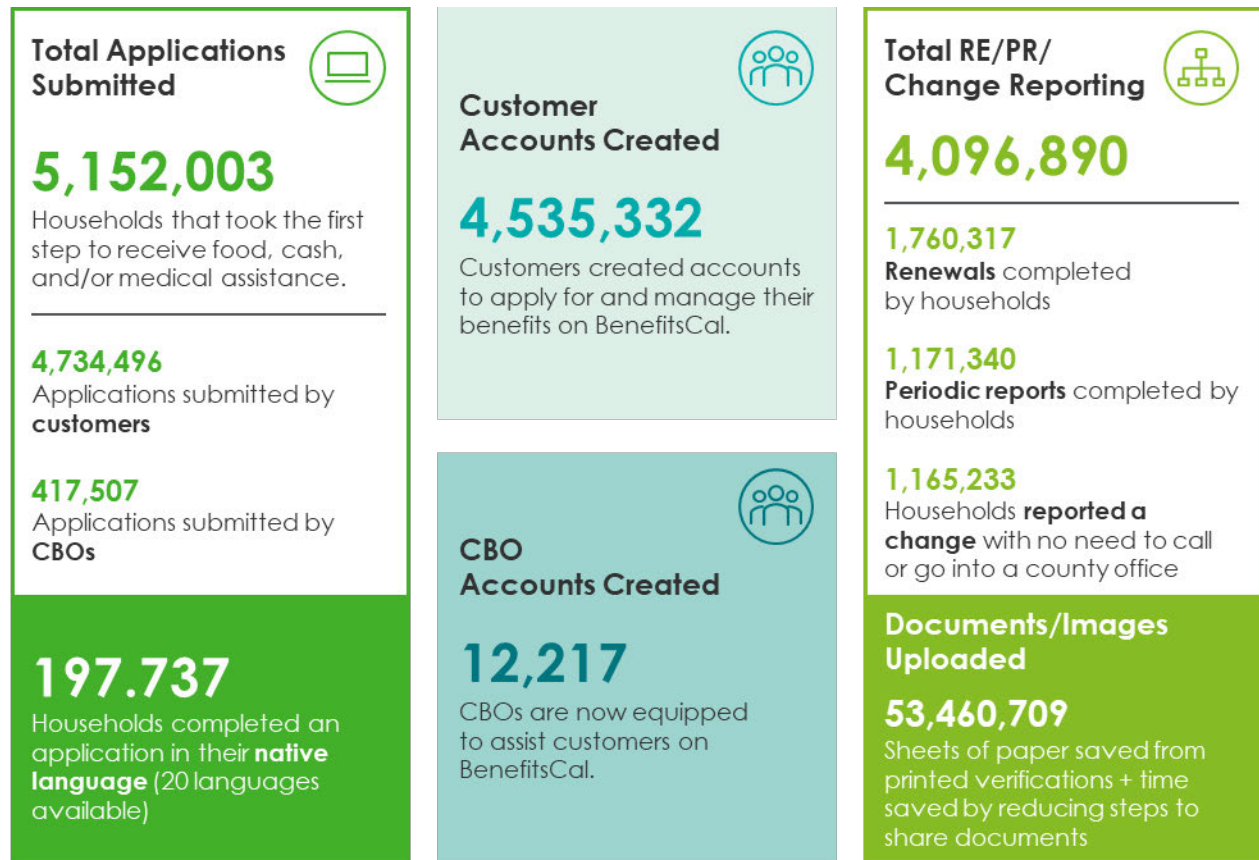
BenefitsCal Services Experience and Capabilities

6.3.3.4.1 Firm Experience Details

The Contractor shall also provide a general narrative description highlighting the Contractor's BenefitsCal Services experience and capabilities.

Our BenefitsCal solution is built so that Californians can apply for and manage their benefits online. Launched in September 2021, BenefitsCal has more than 700 pages available in 20 languages, and functions as a single entry point for Californians applying for State programs, including Food Assistance (CalFresh), Disaster CalFresh, Cash Aid (CalWORKs, General Assistance General Relief, Cash Assistance Program for Immigrants, Refugee Cash Assistance), and Affordable Health Insurance (Medi-Cal and County Medical Services Program).

Since the launch, the solution has enabled **over 5 million California households** to apply for, renew, and report changes to their benefits and complete periodic reports. Customers can create their own BenefitsCal accounts or access CBOs who can help them with their applications. The BenefitsCal application supports **20 languages**, enabling 150,000+ households to complete their application in their native language, supporting California's diverse population. This application has provided an avenue for households to report changes in a timely manner without needing to call or visit a County office. Additionally, the Document Upload functionality has saved **over 46 million sheets of paper** from being printed and saved significant time for State workers and customers. The impact of the BenefitsCal portal is shown in Figure 2-5.



CA_CON_BenefitsCal_JO-074267_2024-0056_3

Figure 2-5. Impact of BenefitsCal on Customers.

Deloitte worked closely with the CalSAWS Consortium, the California Department of Social Services (CDSS), and the Department of Health Care Services (DHCS) to transform and improve the self-service platform through a customer-centric user experience. The BenefitsCal portal replaced C4Yourself, YourBenefitsNow, and MyBenefitsCalWIN to provide one unified experience for all Californians everywhere. As the current vendor for BenefitsCal, Deloitte provides Application Maintenance and Operations (M&O), Application Enhancements, and Cloud Infrastructure services to the Consortium.

Our Success with BenefitsCal

- Implemented a solution for which the cost to process an application in BenefitsCal is **a third of the cost compared to other states** where similar portals have been implemented using on-premises infrastructure; approximate cost to process an application is around 20 cents.
- Implemented a solution where the cost to process an application or a document in this system is **half of what it costs in other states** where similar portals have been implemented on a cloud container.
- Enhanced the BenefitsCal System Administrator dashboard in 2022 so Administrators can easily manage disaster periods by configuring disasters in BenefitsCal without

coding updates, leading to an increase in application flexibility; since inception, **8,167+ disaster aid requests** across 18 Counties have been submitted.

- Implemented a digitized EBT replacement form in BenefitsCal (in English and Spanish) to facilitate easier EBT theft reporting and replacement; **2,850+ EBT theft and skimming applications** have been submitted using BenefitsCal.
- Extended the Document Upload functionality to anonymous customers allowing customers without an account to submit documents; anonymous customers have submitted **more than 365,632 documents** since November 2023.
- **Revamped the BenefitsCal homepage** to improve customer experience with a global search feature (July 2023) and a redesigned announcement banner (August 2023).
- Introduced a **secure two-way messaging feature** between customers and County caseworkers allowing customers to receive the latest updates, ask questions, and act on their cases directly in BenefitsCal, improving the customer experience, reducing case processing delays, and enabling quicker access to benefits.
- Enhanced BenefitsCal Business Intelligence capabilities for stakeholders by providing periodic report metrics on BenefitsCal application and demographics information; enhanced the Qlik application and dashboard reports **widely used by Counties**.
- **Improved customer experience** and usability of the BenefitsCal Annual Recertification (RE) and Periodic Report (PR) submission features by adding RE and PR received dates and process trackers to the client's dashboard.
- **Implemented a “No Change SAR7”** feature in BenefitsCal using Optical Character Recognition (OCR) to read the SAR7 report and determine changes; if no changes are found the CalSAWS eligibility system auto-renews the customer's eligibility, eliminating the need for worker action, enabling faster case processing, and reducing administrative delays and benefits discontinuances.

As it relates to the specific services requested as part of this RFP, the following table reflects our experience and capabilities tied to the eight tasks detailed in the Statement of Requirements. Of note, Deloitte is the **only vendor to have implemented a cloud native, serverless E&E self-service portal in not just one state but in two**. We also are the only Contractor to have translated the self-service portal into 20 distinct languages. We were the first vendor to use conversational AI to support screening for services.

Task	Why our Experience Matters
Task 2 – Project Management	<ul style="list-style-type: none"> • Throughout our partnership with the Consortium since 2020, with close cooperation and collaboration with counties, state partners, regional managers, CWDA and Consortium executives, the Deloitte BenefitsCal team has been performing project management activities including, status reporting, risk management, communications, contract management, deficiency, quality, deliverable and system performance management in accordance with the CalSAWS Project Control Document (PCD). Since 2020, we have partnered with Consortium, Counties, Regional Managers and State Partners during BenefitsCal Portal's Statewide journey, in preparation or delivery of several webinars, training sessions and Management Site Visits, Stakeholder Engagement, Joint Powers Authority, Steering Committee, Legislative presentations and other executive or public meetings.

Task	Why our Experience Matters
	<ul style="list-style-type: none"> The BenefitsCal team also brings the experience and the understanding of the existing CalSAWS Consortium ecosystem to participate in and support the Delivery Integration framework, its governance structure and processes in an integrated multi-Contractor and multi-Stakeholder environment for continued maintenance and improvement of this model and bring-in actions for success.
Task 3 – System Change Request	<ul style="list-style-type: none"> At its core, the system change request (SCR) process for BenefitsCal is beyond just delivering enhancements. It requires a fundamental understanding of the CalSAWS Consortium enterprise, its strategic innovation vision, stakeholder environment, Consortium Enterprise processes, User Centered Design (UCD) and Customer Experience monitoring and measurement. We bring the right team with the subject matter expertise of BenefitsCal and hands-on experience in partnering closely with the Consortium, Counties, end users, State Partners, CWDA, Collaboration Model members and other stakeholders to collect continuous feedback regarding system changes during the delivery cycle. Since the BenefitsCal Portal's go-live in 2021, the Deloitte BenefitsCal team has worked with Consortium in delivery of 614 system improvements utilizing UCD and reflecting the voice of the counties, customers, state partners, CWDA and external constituents in planning, requirements and design for enhancements. We have also partnered with the Consortium and stakeholders to establish the Collaboration Model governance body in 2022 for prioritization of public facing changes.
Task 4 – Marketing and Public Communications	<ul style="list-style-type: none"> Increasing awareness of the BenefitsCal portal is also a critical component of maximizing and optimizing portal use. As an award-winning communications and marketing agency, Deloitte is the right partner for the Consortium to expand awareness of the BenefitsCal portal. We are a full-service creative, production, and post-production agency with deep experience across marketing, advertising, social media management, and video production. We serve 80 percent of Fortune 500 companies and were named the #3 Ad Agency Worldwide by Ad Age. We have defined and amplified leading consumer brands, from [REDACTED], as well as public sector agencies like the United States Postal Service (USPS), [REDACTED] and the Kentucky Department for Public Health. Across our past engagements, we have worked with community organizations to amplify our messages, developed digital and print materials in multiple languages, and taken a human-centered approach to our creative endeavors, driving behavior by appealing to core motivations. We have executed social media campaigns, driven residents to our content with search engine optimization, and developed content for TV and radio.

Task	Why our Experience Matters
	<ul style="list-style-type: none"> The launch of BenefitsCal is one example of our communications and marketing work. The Consortium and Deloitte launched BenefitsCal in 2021. Raising awareness of BenefitsCal was extremely important because the old portal would soon be obsolete and many Californians had not recertified their benefits during the pandemic, resulting in a large backlog of pending recertifications that needed to be completed on the new portal. To address this challenge, Deloitte worked with the Consortium to create 12 marketing deliverables in 20 languages, including branding “Robin the Bear” as the BenefitsCal Mascot, creating an animated video, and deploying a 6-stage email campaign to hundreds of thousands of residents over the course of 8 days. The campaigns sent 578,000 emails, and customers responded to the Call-To-Action (CTAs) at a rate that beat government industry standards. The BenefitsCal campaign achieved an average email open rate of 71 percent compared to the government industry standard of 19 percent. The email campaigns led to more than 129,000 actions on the portal in the first month, and the “Robin the Bear” video has driven close to 4,000 views in the first 4 months (compared to the previous video, which received 9,000 views in about two years). BenefitsCal perception goes beyond marketing and campaigning to providing ongoing opportunities for individuals to learn and understand BenefitsCal. Every quarter, the Deloitte team has conducted webinars with CBOs and Counties to give them exposure to the latest features and also an opportunity to get their questions answered.
Task 5 – Support Services	<ul style="list-style-type: none"> Working alongside the Consortium and other CalSAWS Contractors, since the BenefitsCal go-live 2021, we've determined and validated several legislation/statutory changes and delivered over 100 legislative and policy changes including 17 improvements for Continuous Coverage Unwind following the public health emergency (PHE). The Deloitte BenefitsCal team also worked with the Consortium, CDSS SCERFRA, DHCS SIRFRA or other Stakeholder estimate requests and provided 133 SCERFRA/SIRFRA responses. From the end-user training standpoint, we delivered specific training sessions and live demonstrations for the Consortium, Regional Managers and Counties during the Statewide journey of BenefitsCal portal including CalWIN Waves as well as webinars for CBOs. Additionally, we prepared and delivered a series of OCM materials and supporting artifacts to prepare the Counties, Customers and CBOs for major system improvements such as Multi-Factor Authentication for Case Linking.
Task 6 – Enhancement and Innovation	<ul style="list-style-type: none"> BenefitsCal's architecture patterns and technology stack lay a foundation for future innovation in CalSAWS. Hosted on AWS Graviton serverless architecture, this “first of its kind” and “only” self-service portal is built with cloud-native services and provides 100% automation to build and release code through AWS Code Pipeline. BenefitsCal's auto-scaling capabilities enable optimal performance at minimal costs,



Task	Why our Experience Matters
	<p>dynamically adjusting resources based on real-time demands rather than fixed peak allocations. The cost to process an application in BenefitsCal is 3 times less than in other states for similar on-premises self-service portal infrastructure. This enterprise architecture platform allows for seamless integration of immersive and interactive technologies such as AI to enhance digital government experiences, drive adoption and continuously improve on capabilities to self-serve. As part of ongoing innovations to BenefitsCal, Deloitte introduced conversational AI using Amazon Lex to support screening for services. Since July 2023 alone, our pre-screener chatbot has received more than millions of requests since its inception. Additionally, when presented with the need to be able to identify changes in a digitized image of a SAR7 submitted via BenefitsCal, the Deloitte Team introduced AI-based computer vision technology to determine if a change was reported and send to CalSAWS to accelerate processing of "no change SAR 7s".</p>
Task 7 – Production Operations	<p>Our experience with operating BenefitsCal is reflective of our capabilities to continue to do so in the future with the same degree of quality, stability and resolution. BenefitsCal currently supports over 4,500,000 Customers, and the user base is continuing to expand. On average, more than 150,000 Californians access BenefitsCal to self-serve and manage their case information online on a daily basis. For the volume at scale, it is crucial to provide uninterrupted system availability and a best-in-class digital user experience for this mission critical application. Our operational success is demonstrated by the numbers shown below:</p> <ul style="list-style-type: none"> • BenefitsCal application has achieved a consistent uptime of 99.99%, inclusive of scheduled maintenance for software development, since go-live, providing business continuity and user access to the portal even during scheduled CalSAWS maintenance windows. • The scheduled maintenance windows and outage information are publicly made available on calsaws.org public portal for stakeholder and public awareness • The system processes all transactions within 75 milliseconds within the Service Level Agreement (SLA) rates enhancing user experience and reduced wait times • BenefitsCal system maintains an account access and login success rate of 99.98% across all Customer and CBO users. • Since its initial launch, the BenefitsCal project team has successfully rolled out over 72 releases in production, encompassing Major Releases, Priority Releases, and Emergency Releases. As of July 2024, the BenefitsCal Tier-3 support teams have effectively triaged over 4,391 tickets. Notably, 82% of these tickets were either reassigned to other Assignment groups or resolved with "How-To" guidance. Additionally, the team has identified over 15 usability improvements aimed at enhancing self-service capabilities. These enhancements were inferred from collaborative efforts with the help desk to address customer challenges. Also, over 635 production defects have been addressed as of the July monthly release, while the team continues to maintain a minimal defect backlog. Following the July release, only 11 tickets remain in the pipeline, targeted for future releases, each with clearly defined workarounds and alternative procedures.

Task	Why our Experience Matters
Task 8 – Technology Recovery	<ul style="list-style-type: none"> • Technology Recovery for BenefitsCal has been automated for both Backup systems and failing back to production with automated scripting working in conjunction with integration partners. While there has not been a Technology recovery situation in production the processes and procedures are exercised quarterly. • BenefitsCal's Technology Recovery objectives are set with a with a Recovery Time Objective (RTO) of less than 2 hours and a Recovery Point Objective (RPO) of less than 1 minute, indicating a strong capability to recover from disaster and restore normal operations.
Task 9 - Security	<ul style="list-style-type: none"> • Security is never an afterthought and is at the heart of everything we do for BenefitsCal, which collects Californians' sensitive information. BenefitsCal threat landscape continues to evolve and is a prime target for cyberattacks such as identity theft, fraud, and ransomware due to the sensitivity of the information processed. Deloitte has continuously assessed these threats and implemented required security measures to proactively mitigate cyber-attacks and other security risks. To highlight, BenefitsCal has not had a single breach since go-live and continues to block millions of traffic request every day that are potentially malicious. • Deloitte has been providing security and privacy services to the public sector for over 20 years. We bring to Consortium a team of security professionals with extensive experience serving state government agencies, particularly in helping states certify their E&E and ACA systems with CMS. • With more than 1,100 dedicated security and privacy resources in our practice, we can implement, maintain, and enhance leading security processes and technology solutions while embedding the necessary compliance requirements and keeping your data safe and secure. Deloitte has invested in a global threat intelligence network made up of more than 85 full-time analysts in 25 countries that are researching, gathering, and sharing threat insights on a 24x7 basis. We leverage a variety of threat intelligence sources to enhance BenefitsCal security operations and support a higher velocity and fidelity of security threat detection and response. • We offer a full suite of end-to-end cyber risk capabilities that can help the Consortium address disruptive forces with agile cyber risk strategies. These offerings can help the Consortium protect sensitive information that the system collects, while limiting overall risk, protecting the Consortium's reputation, and helping to maintain public trust in BenefitsCal.

Table 2-1. Deloitte's Services and Capabilities Experience Advances the Evolution of BenefitsCal.

Firm Organization Chart

6.3.3.4.1 Firm Experience Details

The Contractor shall provide a firm organization chart. If the firm is a subsidiary of a parent company, the organization chart must be that of the subsidiary firm. The chart must display the firm's structure and the organizational placement of the BenefitsCal Project. The organization chart must include names and an effective date.

Deloitte has spent the past 175+ years making an impact that matters. It is an enduring story that began in 1845 with William Welch Deloitte—an individual with the idea, the integrity, and the incentive to build something that would last. It was the start of a thriving global organization that has grown to more than 457,000 people who proudly carry forth a legacy of connection and collaboration. We work every day to bring the multidimensional perspectives necessary to solve the world's greatest challenges in business and society—it's in our DNA.

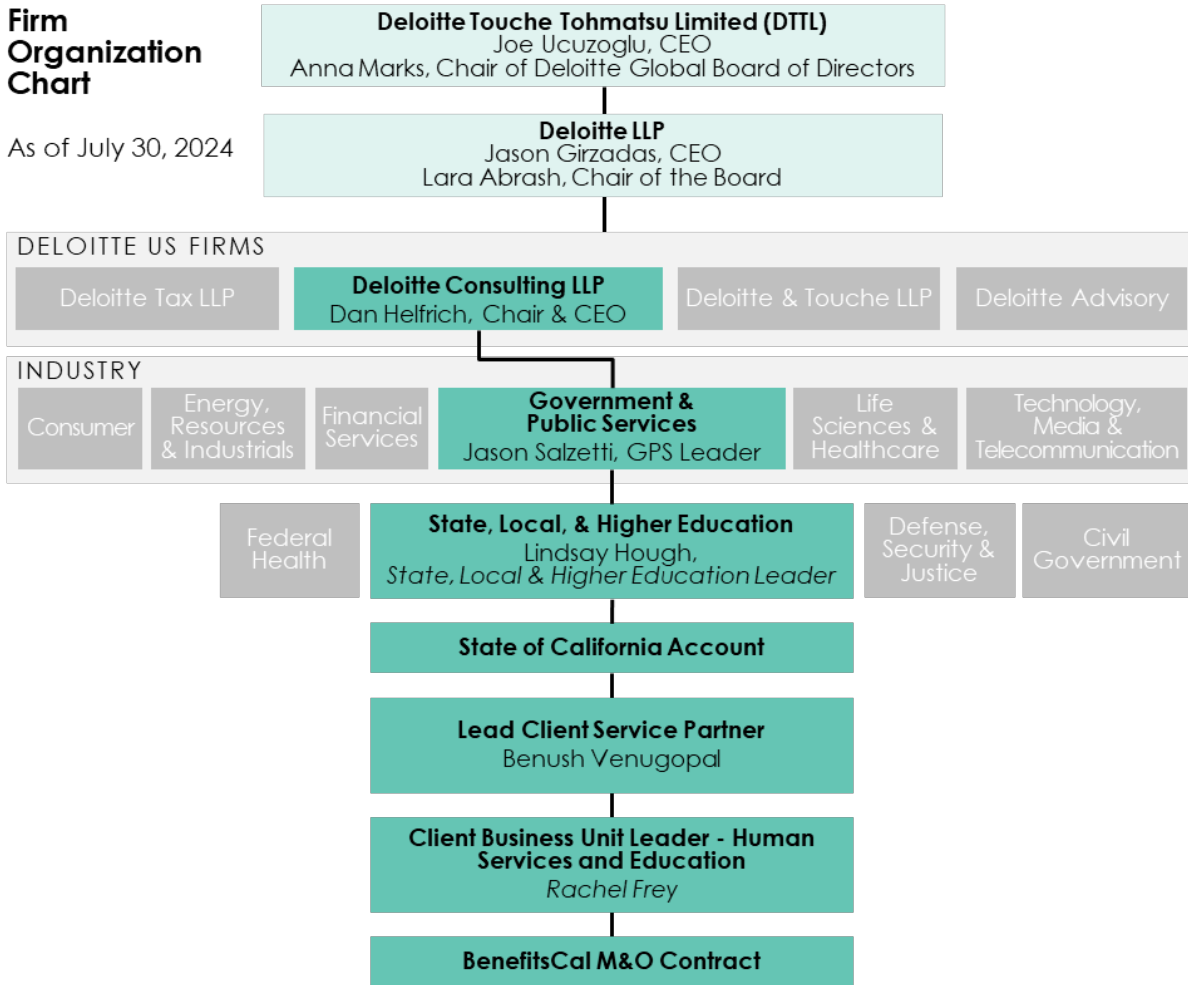
Deloitte Consulting Limited Liability Partnership (LLP) became an LLP in Delaware in 2003 and is the world's largest professional services organization. Our chair and chief executive officer is Dan Helfrich. Our board of directors maintains general authority and supervision over the management, practice, and affairs of Deloitte Consulting LLP and establishes its various policies. Deloitte Consulting LLP is a subsidiary of Deloitte LLP, which is also a limited liability partnership registered in Delaware. Deloitte LLP is the U.S. member firm of Deloitte Touche Tohmatsu Limited (DTTL), a United Kingdom private company limited by guarantee.

Figure 2-6 depicts the firm structure as an organization chart and the organizational placement of the BenefitsCal M&O Project.



**Firm
Organization
Chart**

As of July 30, 2024



CA_CON_BenefitsCal JO-074287_2024-0081_4

Figure 2-6. Deloitte Organization Chart.

Additional Relevant Information

6.3.3.4.1 Firm Experience Details

The Contractor shall supply any additional information not already presented in this Section, which the Bidder believes to be relevant to the Consortium's assessment of the Contractor's experience with regard to the specifics of this RFP.

Deloitte is committed to engaging with the Consortium to meet the needs of BenefitsCal users. Our firm can help keep BenefitsCal secure, increase Californians' awareness of it, and provide guidance on rapidly evolving technology relevant to the solution. In addition to our market leading experience in E&E systems, we highlight two additional capabilities of note:

- **Strategic Technology Alliances:** Our comprehensive set of alliances enables Deloitte to help keep the Consortium and BenefitsCal at the forefront of new technology.
- **Artificial Intelligence and GenAI:** Deloitte has integrated AI and GenAI capabilities into capabilities ranging from supporting project delivery, evaluating customer experience, monitoring systems, and features added to our solutions.

Strategic Technology Alliances

Our strategic technology alliance pillar provides Deloitte with access to subject matter specialists, burgeoning technologies, and overall knowledge to help inform technology strategies. Our strategic technology alliances, shown in Figure 2-7, include AWS (where Deloitte is a premium consulting partner and certified managed service provider), Microsoft Azure, Google Cloud Platform (GCP), and Oracle Cloud. Our strategic technology partnerships offer a vast support network that is significantly valuable to our continuing collaborations with the Consortium.

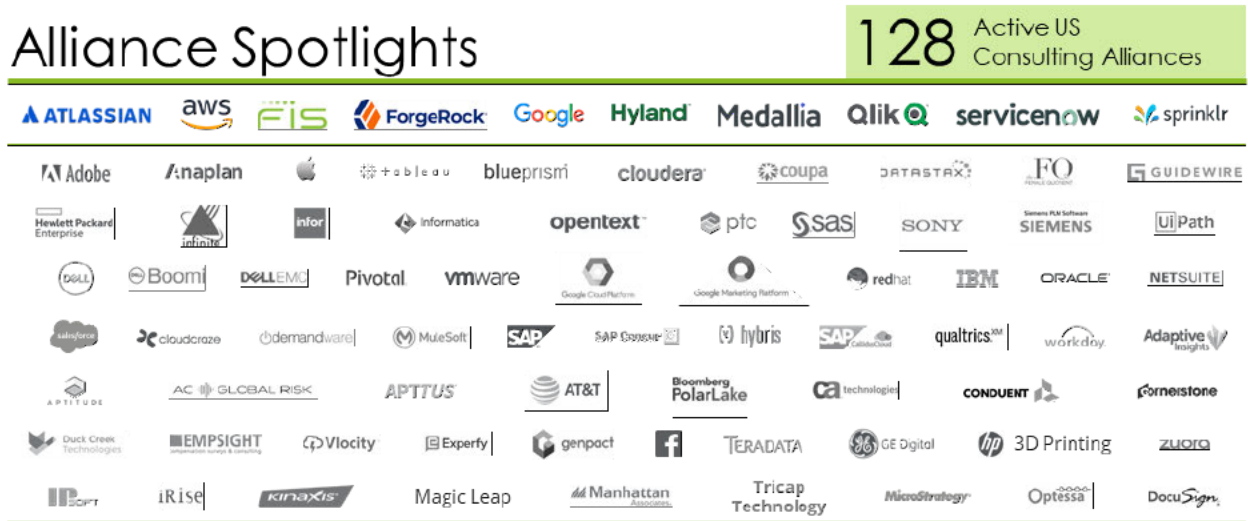


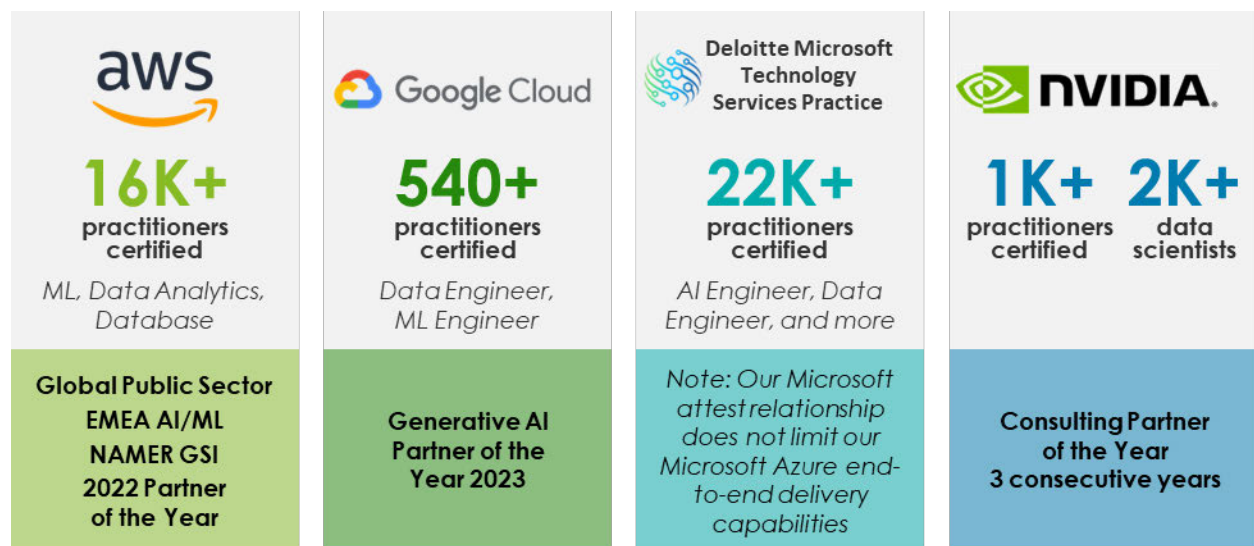
Figure 2-7. Deloitte Consulting's Strategic Alliances.

Artificial Intelligence and GenAI

In the ever-evolving realm of technology and the evident pathway for the future paved by Artificial Intelligence and Machine Learning Deloitte's toolsets have emerged as a transformative force, reshaping the software and operational life cycles across industries, including the Government and Public Sector across the country.

Deloitte is unique from other vendors in that we provide hands on technical expertise combined with industry and government subject matter knowledge to design, deliver, and deploy AI solutions which meet Consortium business vision for Automation, Machine Learning and Artificial Intelligence.

We also bring dedicated alliances and ecosystem relationships, as shown in Figure 2-8, to help develop strategic implementation practices and a technical architecture to meet Consortium's unique needs. The Figure below illustrates a subset of alliances and relationships that Deloitte has formed to support advanced analytics, ML, and AI capabilities.



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Figure 2-8. Deloitte's Primary AI Vendor Alliances.

Deloitte has made investments in building out a suite of engines, AI Engines, that provide business-specific solutions to challenges facing government and public sector clients. Our investments include building a large language model (LLM) specifically aimed at the Health and Human Services (HHS) business domain. Our team brings hands-on implementation expertise from 130+ AI solutions in production with proven outcomes across 27 states in the spectrum of solutions including:

- **Robotic Process Automation (RPA)** in a Northeast state that updates 3000+ client address every month in the integrated eligibility system to reduce returned mail. Also, RPA solution to assist with case processing and eligibility determination for newborns.
- **Optical Character Recognition** solution in a Western state that processes SNAP mid-term reports and renewals with 98% accuracy.

- **Conversational AI** in a Western State that provides clients with 24/7 service and can answer FAQs and case-specific questions.
- **iOCR and RPA** assist with digitization of handwritten forms and returned mail processing.
- **GenAI** solutions for IVR surge support in a Western state to assist worker inquiries.
- **Machine Learning** solutions in a Southwest state that detects case errors before benefit determination and flags for workers to improve program integrity. This resulted in workers correcting 5,500+ errors in the first six weeks of go live.
- **Generative AI** solutions in a Western state that summarize information from 1000+ pages of reference policy material to provide details of SNAP policies in plain language and assists staff in answering complex SNAP questions.
- **Generative AI** solution in a Central state that transforms notices and communications into language that is easier to comprehend.
- **Data-Driven Decision-Making** using Deloitte's Generative AI-based insights, accelerators can improve data integrity, consistency, and insight speed, leading to state agencies making more informed and confident strategic decisions.

In addition to features included in our solutions, Deloitte has made investments in Generative AI solutions that accelerate delivery and enhance delivery quality. Our teams use Generative AI tools to analyze intricate code patterns, suggesting precise corrections and test cases. Our teams are also including code generation tools in technologies similar to those used by BenefitsCal as part of their delivery toolkits. The tools comprehensively assess defect patterns, enabling us to recommend dependent fixes and conduct checks for compliance issues and missing scenarios. Generative AI has revolutionized testing efforts by accelerating test case and test data generation and enabling automated test execution using Deloitte's Test.AI. Furthermore, we use it to elevate the testing process's rigor.

We also have built a suite of tools under the brand of AIOps that supports production operations activities including analysis of logs to identify trends and predict anomalies as well analyzing service design incidents to identify themes. Our researchers and designers heavily utilize Genesis, a Deloitte created solution, to perform text analytics and sentiment analysis to support marketing campaigns, communications and User Centered Design activities.

In bringing our AI capabilities to our clients we accelerate delivery timelines, enhance development and testing rigor, fortify the software performance and security, and build more tailored communications and user experiences leading to a more reliable and stable software ecosystem.

2.1.1.1 Experience developing, implementing and/or supporting portal and/or mobile applications in the Health and Human Services arena

5.2.1.1 Firm Mandatory Qualifications

F1

At least three (3) years of Prime Contractor experience developing, implementing and/or supporting portal and/or mobile applications in the Health and Human Services arena. Experience must have been completed or ongoing within the last five (5) years.

With a robust history of HHS service dating back more than 45 years, Deloitte has more experience than any other vendor in delivering HHS systems in the U.S. We have supported more HHS portal and mobile projects than any other vendor, totaling 27 since 2000. With this extensive experience, we can bring assets, proven processes, and experienced practitioners to develop, implement, and support HHS portals and mobile applications. As noted before we are the only vendor to have implemented an E&E portal using a cloud native, serverless architecture which has driven a lower total cost of ownership as compared to other solutions across the country. Deloitte recently completed a transfer of the BenefitsCal solution to the State of Florida which is the most recent implementation of an E&E portal in the country.

Deloitte's GPS practice has a distinguished track record of continuous support and collaboration with human services agencies. Our extensive service spans eligibility and enrollment for SNAP; Disaster SNAP, Temporary Assistance for Needy Families (TANF); Medicaid; Child Care; Low Income Home and Energy Assistance Program (LIHEAP); state Children's Health Insurance Programs; disability insurance; Emergency Rental Assistance Program (ERAP), AIDS support programs; healthcare reform provisions; and Women, Infant and Children (WIC), along with child support, child welfare, and newborn and prenatal screening.

Our experience, illustrated in Figure 2-9, shows that we can successfully develop, implement, and maintain portal and mobile solutions. Our solutions range from implementation-planning and requirements-gathering to designing and deploying solutions that encourage user engagement and maximize adoption. Once the solutions are in place, we work together to continuously enhance and modernize client portfolios.

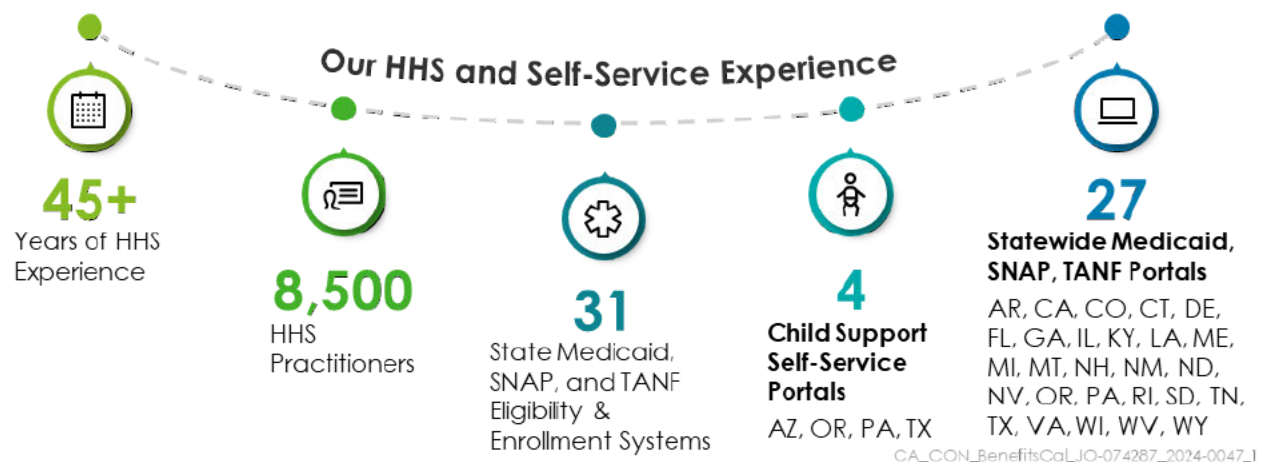


Figure 2-9. Our HHS and Self-Service Experience.

Some vendors concentrate exclusively on public-facing solutions without considering the people affected on the back end. Others focus solely on the technological aspects, which can lead to challenges in adoption. Our approach, in contrast, reflects a comprehensive understanding of the end-to-end impacts of portal and mobile solutions. This includes the needs of customers, those assisting them, administrators, and service providers.

During the last five years we have supported the ongoing maintenance and enhancements of HHS self-service portals and mobile applications, and where we were the original implementer, in Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Illinois, Kentucky, Louisiana, Maine, Michigan, Montana, Nevada, New Hampshire, North Dakota, Oregon, Pennsylvania, Rhode Island, South Dakota, Tennessee, Texas, Wisconsin, and Wyoming. We have included details of our HHS portal and mobile experience in “Vol 1 Sect 5 Att 8 Firm Mandatory Qualifications–Deloitte”.

To illustrate one example we are highlighting a modernization effort for the Commonwealth of Kentucky. In October 2020, Deloitte worked with the **Commonwealth of Kentucky** to implement kynect benefits, a public-facing self-service portal that provides Kentucky’s families access to public assistance benefits such as SNAP, Medicaid, TANF, and Child Care Assistance Program (CCAP). Customers, assisters, and other community partners can apply for benefits, manage the benefit cases, report a change, renew their benefits, and provide verification documents using kynect. It was designed with a UCD and a mobile-first approach, and over 70 percent of users opt for access through mobile devices or tablets. After implementation, application intakes from kynect benefits increased 140 percent. Deloitte continues to implement system enhancements, such as an appointments module, Qualified Health Plans, and a chatbot.

2.1.1.2 Experience performing application maintenance and system modifications applying UCD process and User Experience (UX) activities on IT projects

5.2.1.1 Firm Mandatory Qualifications

F2

At least three (3) years of Prime Contractor experience performing application maintenance and system modifications applying UCD processes and User Experience (UX) activities on IT Projects.

When Deloitte implements and supports portals and mobile applications, we emphasize the human experience. Deloitte offers exceptional design capabilities, including user research and UCD, agile digital development, advertising and marketing, human capital management, and digital transformation launchpad. UCD is essential for any application, and it is particularly vital for HHS applications that provide individuals with a pathway to apply for and receive health benefits.

Our UCD approach is rooted in our experience partnering with several government entities, as shown below in Figure 2-10, to design and implement complex, large-scale self-service solutions for their residents. We have used our design capabilities, including applying UCD processes and UX activities with U.S. state government clients, including **California, Texas, Pennsylvania, Tennessee, Kentucky, Wisconsin, New Mexico**, and others. Our design capabilities draw from commercial best practices while remaining

sensitive to the nuances of government digital transformations. Through extensive research on customer expectations of government services, we have gained insight on the needs, expectations, and areas of improvement.



Figure 2-10. Deloitte's UCD Footprint in the GPS Sector.

User research and UCD are at the core of the modern customer experience. We have pioneered the tools and techniques that get to the heart of the human need, from which we can design experiences that truly delight customers. Our research methods go far beyond multiple-choice surveys and usability testing. We use ethnographic techniques to engage with customers and walk in their shoes. This helps us identify the modes of interaction, customer mindsets, and opportunities to reimagine the customer experience, as shown in Figure 2-11. These techniques underpin Deloitte's approach to our work with the Consortium.



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Figure 2-11. Our Design Capabilities Allow Us to Successfully Engage with End Users Throughout the Implementation.

To illustrate our experience, we have included two summaries where we have modernized integrated portals for health and human services recipients in the **State of California** and the **State of Michigan**.

For the State of California's Healthcare Eligibility, Enrollment, and Retention System (CalHEERS), Deloitte worked with the State of California to create a cultural shift in the design approach, moving from a focus on business requirements to a UCD approach. This shift resulted in a higher-quality user experience, [REDACTED] for changes in final design sessions. This accelerated the development process and resulted in cost savings in production.

In Michigan, the Michigan Department of Health and Human Services (MDHHS) had the overall goal for MI Bridges to support Michigan residents through a one-stop-shop for clients and community partners. MI Bridges was developed with a focus on iterative design and user testing to best meet the needs of the user, utilizing UCD principles. To achieve its goals, Deloitte worked in collaboration with a Michigan-based non-profit called Civilla to formulate a comprehensive plan for user research and user testing. Based on the scope and priority of the MI Bridges modules being tested, one to six rounds of testing were conducted for all client-facing functionality. The design and development of MI Bridges illustrates the emphasis on feedback as a conduit for UCD to genuinely express the voice of the customer.

As an example, the Document Upload feature is one of the most impactful and frequently used features in MI Bridges. To that end, we completed four rounds of improvement testing on the Upload Documents module to solicit feedback from real client users and identify where enhancements are possible. This demonstrates our ongoing commitment to revisit the product backlog of feedback and lessons learned.

In addition to UCD work in GPS, Deloitte has also leveraged this methodology with our clients in the Commercial sector. Figure 2-12 presents a sample of our commercial sector clients across a range of industries. We have helped our clients navigate their digital transformation using UCD.

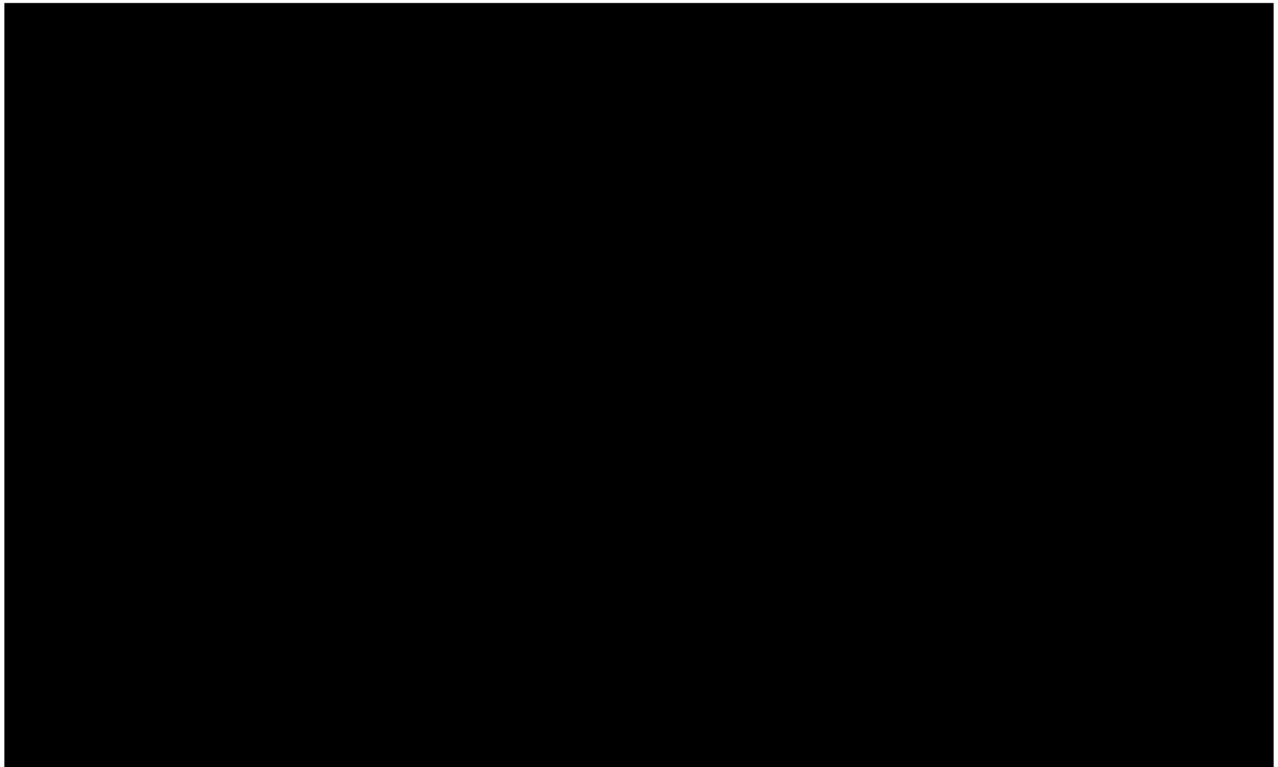


Figure 2-12. Select Deloitte Commercial Sector Clients.

Our reputation is built on the success we help achieve for our clients. By using UCD, customers and their experience stay at the forefront of solution design and continuous improvement. A user-centered approach starts from where you are—stakeholder feedback is the basis for innovating toward organizational improvement. Our goal is to transform an organization by being human-centered and incorporating human feedback at every step of the continuous improvement process.

We have included details of our experience performing application maintenance and system modifications applying UCD processes and User Experience (UX) activities on IT Projects in “Vol 1 Sect 5 Att 8 Firm Mandatory Qualifications–Deloitte” in Section 5.

2.1.1.3 Experience performing application maintenance and system modifications with real-time web-based application in JAVA and AWS cloud architecture

5.2.1.1 Firm Mandatory Qualifications

F3

At least three (3) years of Prime Contractor experience performing application maintenance and system modifications in an environment of similar size and complexity to the BenefitsCal application with: 1) Real-time web-based application experience in JAVA; and 2). AWS cloud architecture and/or deployment experience.

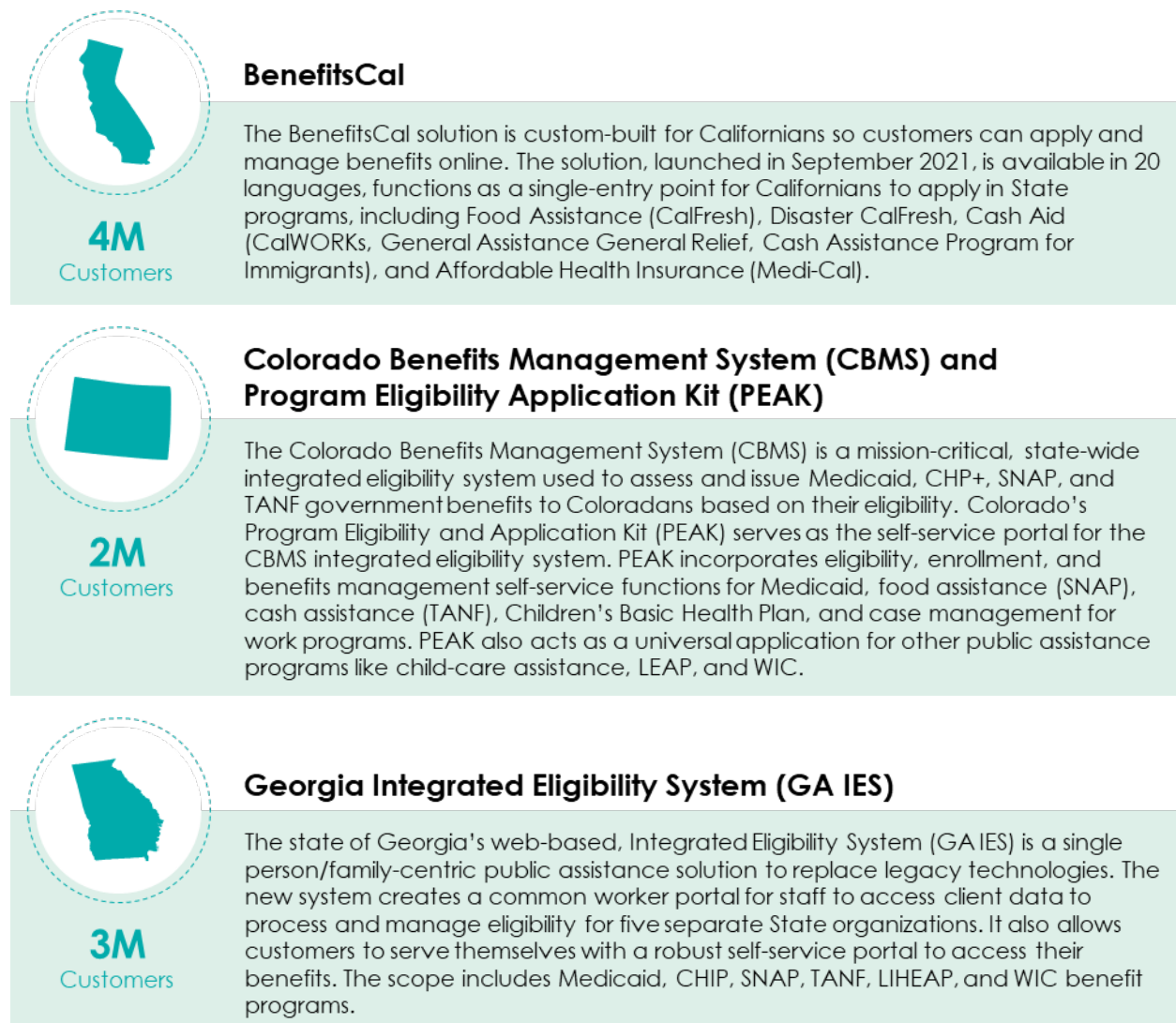
Our Real-Time Web-Based Application Experience in Java

Since Java was introduced in 1995, Deloitte has been at the forefront of developing Java-based applications. To meet our clients' evolving needs, we have consistently adapted to the more modern, client-side JavaScript architectures and made investments in our staff. Of the 31 E&E systems and Health Insurance Exchanges (HIXs) we have deployed, 26 are Java-based solutions (supporting over 40 million Medicaid

enrollees nationwide), and we have more than 5,000 skilled Java HHS practitioners. As part of the initial implementation effort for BenefitsCal we moved to a React-based presentation away from pure Javascript as the more modern language affords lower maintenance effort and more flexibility with the user interface.

We have included details of our experience performing application maintenance and system modifications in an environment of similar size and complexity to the BenefitsCal application with: 1) Real-time web-based application experience in JAVA; and 2). AWS cloud architecture and/or deployment experience in “Vol 1 Sect 5 Att 8 Firm Mandatory Qualifications–Deloitte”.

Figure 2-13 highlights our select Java-based solutions. These demonstrate our experience implementing solutions similar in size and scope to BenefitsCal.





2.5M
Customers

Illinois Integrated Eligibility System

Illinois's web-based, Integrated Eligibility Solution supports over 2.5 million residents. The first release included a robust self-service portal, and supported SNAP, TANF, and Medicaid. Deloitte assisted the State in successfully implanting the solution by leveraging the existing legacy systems for back-end processing. The second release replaced the legacy systems used for back-end processing, added eligibility rules not included in the first phase, and included enhanced self-service portal and hearing and appeals functionality.



1M
Customers

Louisiana Common Access Front End

The state of Louisiana Office of Technology Services engaged Deloitte to assist the Department of Education in implementing a new Common Access Front End (CAFÉ) to assist childcare assistance clients in obtaining childcare benefits, assist childcare providers in providing childcare benefits, and assist state workers in managing and administering childcare benefits. Our team developed a Provider Self Service Portal, a customer Self-Service Portal, and a Child Care Worker Portal. In addition to supporting Child Care, Support, and Welfare, CAFÉ facilitates SNAP and TANF as well.



2.5M
Customers

Michigan Bridges and MiBridges

Our work in Michigan includes the design, development, training, and implementation services for the Michigan Bridges statewide eligibility system for the Department of Human Services. The implementation of the J2EE-based Bridges application relies heavily on a services-oriented architecture and consolidates three separate primary systems to reduce the administrative workload in local offices across 84 counties. It supports workload management for TANF, SNAP, Emergency Relief Services, Medicaid, and Child Care programs.



200,000
Customers

Combined Healthcare Information and Montana Eligibility System (CHIMES)

The CHIMES system is a person/family-centric IE-BM system to replace legacy technologies. The new system includes a web-based worker portal to centralize workload-providing workers with a streamlined application process and minimize time spent on administrative tasks. CHIMES is also equipped with a robust self-service Portal to help customers apply for state benefits, including TANF, SNAP, Medicaid, Emergency Assistance, and Refugee Social Services.



1M
Customers

Access Nevada

Access Nevada supports delivery of Medicaid, SNAP, and TANF to over a million clients. Deloitte has supported Division of Welfare and Supportive Services (DWSS) in enhancing its IE system and business processes through technology upgrades, changes to maintain state and federal policy compliance, and enhancements of varying durations.



300,000
Customers

New HEIGHTS – New Hampshire

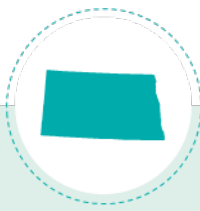
Deloitte assisted New Hampshire's Department of Health and Human Services with a legacy modernization project. The solution, called New HEIGHTS, helps to manage eligibility, enrollment, and service delivery for Medicaid, Medicare Savings Program, SNAP, TANF, Child Care scholarships, state supplemental programs, and foster care and subsidy adoption programs.



830,000
Customers

Automated System Program and Eligibility Network (ASPEN) – New Mexico

Since 2011, Deloitte has supported New Mexico in implementing a fully functional Integrated Eligibility and Enrollment System. The ASPEN solution supports over 800,000 residents in applying for and receiving SNAP, TANF, Medicaid, and LIHEAP benefits and work requirements functionality. In 2017, New Mexico's Medicaid Manager Care Enrollment program was implemented into ASPEN.



124,000
Customers

Self Service Portal and Consolidated Eligibility System (SPACES) – North Dakota

The SPACES system is an IE system creating an integrated single person/family-centric system by replacing legacy technologies with the NextGen framework. The new system has a worker portal that enables the processing of MA, SNAP, TANF, Child Care, and LIHEAP in a single integrated platform, and a robust self-service portal to give residents the ability to apply for benefits online.



1.2M
Customers

Oregon Integrated Eligibility

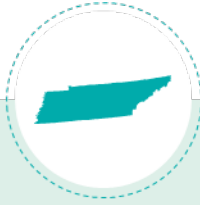
The State of Oregon's web-based, Integrated Eligibility System (Oregon IE) project provides the implementation of a single public assistance solution to replace the existing benefit systems for TANF, SNAP, Medicaid, Child Care, and Summer Meals.



456,000
Customers

RIBridges – Rhode Island

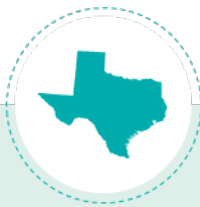
Rhode Island Bridges Systems, the state's HIX system, provides case management and eligibility determination for the Modified Adjusted Gross Income (MAGI) Medicaid and CHIP programs. Deloitte, the implementation vendor since 2013, has been collaborating with the State to expand the solution, convert the legacy data, and perform targeted business process reengineering.



1.4M
Customers

Tennessee Eligibility Determination System (TEDS)

Deloitte is working with Tennessee to develop a single system for the state to determine eligibility for the Medicaid and CHIP categories. The TEDS solution consists of a worker portal, a self-service portal, a partner portal for determining Presumptive Medicaid Eligibility, and an iOS- and Android-compatible mobile application for members to check benefits and upload documents.



5.8M
Customers

Texas Integrated Eligibility Redesign System (TIERS)

The Texas Integrated Eligibility Redesign System (TIERS) Deloitte delivered in Texas supports TANF, SNAP, MAGI Medicaid, Non-MAGI Medicaid, and CHIP. TIERS is equipped with a worker portal, a self-service portal (which also includes screening capabilities to assess a customer's assistance needs and generates a referral that is sent to the relevant agency), and a mobile application.



1M
Customers

Virginia Case Management System (VaCMS)

The VaCMS system is an IE system creating an integrated single person-/family-centric system by replacing legacy technologies with NextGen framework. The new system has a worker portal that enables the processing of MA, SNAP, TANF, CC, and LIHEAP in a single integrated platform, a robust self-service portal to give residents the ability to apply for benefits online, and complex integration with 40 different external interfaces.

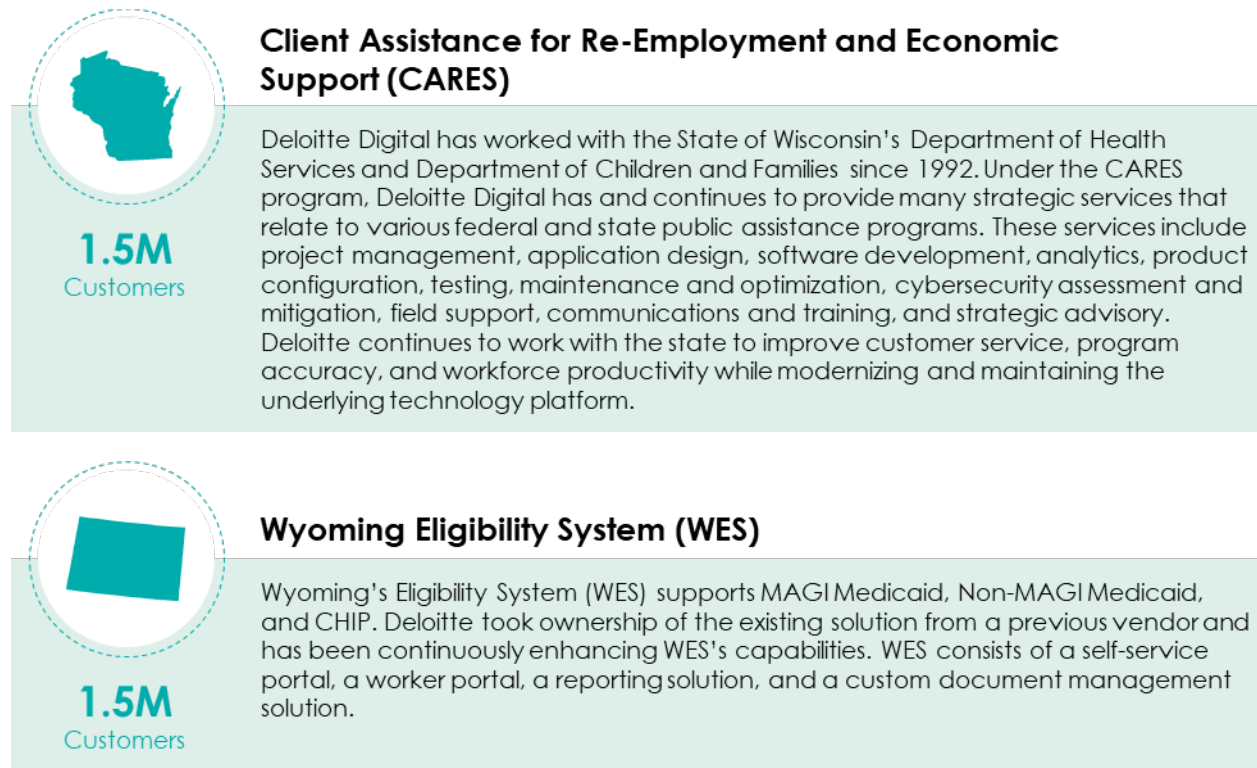


Figure 2-13. Highlights of Our Large-Scale, Human Services Java-Based Solutions.

Amazon Web Services (AWS) Cloud Architecture and Deployment Experience

Deloitte has a growing and dedicated AWS practice that can support the Consortium through successful maintenance, operation, and enhancement of the BenefitsCal infrastructure. We have over 5,000 cloud practitioners and 5 major cloud delivery centers that provide the foundation of a client-first approach that drives results. Deloitte professionals have earned more than 19,000 AWS certifications at every level. As a firm, we have achieved 29 AWS competencies. The AWS Competency Program is a specialization program that validates and promotes partners with demonstrated technical expertise and proven customer service. AWS has more mission-critical HHS-related workloads in operation than any other cloud provider, and it was the first public cloud provider to host government workloads. Our HHS experience, along with the AWS technology platform and our knowledgeable cloud practitioners, allows Deloitte to maintain and enhance BenefitsCal. We are heavily investing in cloud infrastructure and services to help our clients accelerate migration of core business applications and processes to the cloud.

DISTINGUISHING FACTORS



- Deloitte brings extensive experience and partnership with AWS and a commitment within California's state and local HHS agencies to continue supporting their journey to modernize mission-critical applications.
- Deloitte brings experience delivering hundreds of global AWS projects completed for public sector and commercial enterprise clients.

Deloitte has been an AWS Partner since 2014 and is a Strategic Global Systems Integrator Premier Consulting Partner in the AWS Partner Network (APN). AWS's Premier Consulting Partner designation highlights the APN Consulting Partners that have distinguished themselves by investing in their AWS practices, achieved multiple AWS Accreditation and Certifications, and provided exceptional service to customers moving to and running their applications on AWS. Our collaboration with AWS, along with our extensive experience, allows us to offer services to the Consortium that leverage the full potential of cloud transformation. It also gives us access to the highest quality support to mitigate any issues that arise. This enables us to deliver a reliable BenefitsCal solution that Californians can continue to rely on for benefits access.

AWS Competencies

Deloitte is certified AWS Public Sector Partner—just one of seven AWS Partner Programs. We have been certified with 17



AWS Service Validations and certified in 29 AWS Competencies, including: Government, Data and Analytics, Machine Learning, Machine Learning–Conversations AI, and DevOps, including both the [Migration Delivery and Migration Technology Partner](#). These AWS Alliance competencies speak to Deloitte's deep ties to AWS.

In 2023, Deloitte received several recognitions from AWS at re:Invent, as listed below. A learning conference, re:Invent hosted by AWS for the global cloud-computing community.

- Global GSI Security Partner of the Year–2023
- Global GSI Data and Analytics Partner of the Year–2023
- APJ Public Sector Partner of the Year–2023
- ANZ GSI Partner of the Year–2023
- GCR Innovation Partner of the Year–2023
- Benelux GSI Partner of the year–2023
- EMEA GSI partner for AI/ML– 2023

AWS Premier Partner

As a premier partner of AWS, Deloitte is afforded a number of benefits including over 80 dedicated AWS resources to build capabilities across industries and offerings, develop proofs of concept, provide expert design reviews and guidance on best practices, access to training, preview of product and services roadmap to further assist clients in building out an optimized solution architecture with net-new services, special pricing discounts for clients through the enterprise agreement and through our resellers, and ability to “hit the ground running” with access to a number of tools and accelerators made available to Deloitte.



One such example of the benefits of this alliance is the successful migration of the **State of Colorado's** Integrated Eligibility system, the Colorado Benefits Management System

(CBMS), in AWS cloud. More than 300 servers, including one production and 20 non-production environments were migrated from on-premises to cloud. This migration included adoption of cloud-native technologies and made CBMS one of the first entirely cloud-based eligibility systems in the country. The project was one of the largest and most complex migrations in AWS's public sector.

Another example of the benefits of this alliance is the seamless migration of the **State of California's** Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) from an on-prem Data Center to the AWS cloud on time and within 18 months. Deloitte and AWS carried out an open-source, cloud-native legacy upgrade to containerize and modularize the system for faster deployment, more scalability, and reduced software license costs. This migration required moving more than 450 terabytes of production data. Since the migration, Deloitte and AWS worked to meet all relevant system availability Service Level Agreements (SLAs).

2.1.1.4 Experience Transitioning IT Systems Between Companies

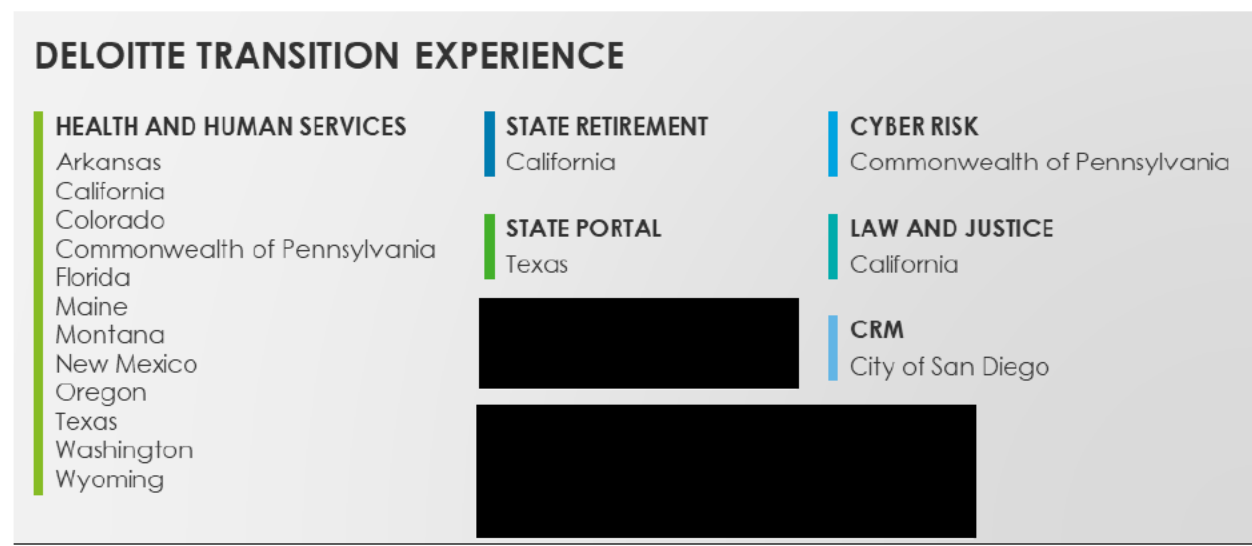
5.2.1.1 Firm Mandatory Qualifications

F4

Prime Contractor experience with the transition of one IT System, from one company to another. The Project must have occurred within the last ten (10) years.

Deloitte has substantial experience delivering successful vendor-to-vendor IT system transitions. This is a critical task, and we have a record of smooth IT system transitions, supporting operational consistency with minimal disruption throughout the transition period. This is especially critical for systems that support HHS programs, as these systems aid Californians in accessing critical health benefits.

As highlighted in Figure 2-13, Deloitte has relevant experience serving as the new vendor across sectors. Operating as the Transition-In vendor, we work with the client team to stabilize the system, help achieve quick wins, and establish a proactive approach to managing their environments. These actions enable us to make a smooth transition with the incumbent vendor.



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Figure 2-8. Deloitte Transition Experience.

To showcase IT transition projects related to HHS, please see the details on CalHEERS and Arkansas DHS ISS below. In these projects, we successfully transitioned in as an M&O vendor for a complex eligibility system and application portfolio, respectively.

We have included details of our transition in experience in “Vol 1 Sect 5 Att 8 Firm Mandatory Qualifications–Deloitte” within Section 5. To showcase examples of our transition in experience we have highlighted two such examples below. In addition to transition in experience from one vendor to another we have also performed transition in activities where we were the incumbent for our existing M&E contracts as would be the scenario for this contract.

State of California, Office of Systems Integration–CalHEERS

Deloitte has served as the M&O integrator for CalHEERS, California's large and complex eligibility system, since September 2019. Deloitte delivers enhancements, security, and maintenance, while also managing subcontractors and product vendors. Additionally, we provide help desk support and oversee the continuous operations of core applications. Deloitte is responsible for implementing accelerated modernization programs, including the migration and optimization to an AWS Cloud environment, delivery model transformation (Agile/DevOps), and workforce transformation.

Deloitte successfully **transitioned the system** from the incumbent vendor during the COVID-19 pandemic in 9 months (3 months ahead of schedule) with 100 percent availability and minimal disruption to stakeholders, plan members, and consumers. The system required modernization and scalability to address increased user demand during the busy Open Enrollment period. The team implemented hundreds of system enhancements while maintaining current operations, such as enabling and expanding the Special Enrollment Period for COVID-19-impacted individuals to apply for subsidized health coverage. During the annual Open Enrollment period, millions of Californians used the platform, with more than 36,000 average daily users, more than 55 million average daily system transactions, 149,000 user visits, and 98 million transactions per day during peak Open Enrollment. Since transitioning to the role of CalHEERS IT System Vendor, Deloitte has managed an increase in both the size and complexity of the application. Despite these challenges, we consistently achieve reductions in M&O Services costs annually, as tracked through our rigorous budget planning, monitoring, and review activities.

Arkansas – Arkansas Department of Human Services (DHS) Information Support Services (ISS)

Deloitte was selected as the M&O vendor for Arkansas DHS's large and complex application portfolio. In replacing the incumbent vendor, who managed the DHS portfolio for more than 20 years, the Deloitte team effectively coordinated with the incumbent vendor and client to support a smooth transition.

Deloitte's full services include M&E of the DHS application portfolio, including over 130 applications, thousands of hours of enhancements to the suite of legacy applications per year, incremental modernization to several legacy systems including enterprise licensing, behavioral health case management for substance abuse, and employee travel reimbursement applications.

We also oversaw the comprehensive management of all analytics functions, including management of the existing data warehouse and implementation of various operational dashboards, including ad hoc reporting and as-needed services to manage end-user desktops. In addition, Deloitte manages security and cyber-related activities such as audit support and vulnerability scanning with manual penetration testing.

2.1.2 Firm References

5.2.1.2 Firm References

The purpose of the Firm Reference requirements is to provide the Consortium with the ability to assess the Firm's experience in supplying similar or relevant services to those identified in this solicitation. Firm References must be documented according to Section 6 - Proposal Structure and Submission. The Consortium may contact references listed to verify the information provided by the Bidder. In addition to the references provided by the Bidder, the Consortium may also request references from relevant public agencies with whom the Bidder has current or past Contracts similar in nature. For Bidders with whom the Consortium has current or past Agreements similar in nature, the Consortium may also complete one or more formal references. Any references received from other relevant public agencies and/or the Consortium will factor into the Business Proposal Evaluation as described in Section 8 – Evaluation. Proposals with forms that have alterations or changes to the original information will be considered nonresponsive. Any conflicting information may result in the Proposal being deemed nonresponsive.

The completed and signed Firm References, in the required format, have been provided separately as *"Vol 1 Sect 5 Att 9 Firm Reference - Deloitte"* within Section 5 Attachments.

2.2 Firm Financial Resources

6.3.3.4.2 Firm Financial Resources

Bidders will provide financial qualifications as contained in Section 5.2.1.3 associated with the prime Contractor and any Subcontractor providing at least 20% of the annual revenue during the base contract period.

RFP: Section 5.2.1.3

Firm Financial Qualifications must be met and documented according to Section 6 - Proposal Structure and Submission. Firm qualifications must be provided for Subcontractors who provide at least 20% of the annual price during the base contract period.

In the event of any form of business or corporate reorganization by Bidder (e.g., sale, merger, rebranding, or other similar form of reorganization), the Bidder shall provide the required financial information for the Bidder's successor in interest.

Bidders will provide responses to:

- F6a or F6b. Do not respond to both, and
- I-F7, and
- I-F-8

During the base contract period, we will not have subcontractors. As such, we have not provided the subcontractor details requested.

2.2.1 Financial Statements

5.2.1.3 Firm Financial Qualifications

F6

a. The Bidder will provide financial statements for the past two (2) fiscal years for the Contractor and each Subcontractor. These must be audited financial statements unless audited statements are not a part of the routine business practices of the firm. The Consortium will accept financial statements audited according to either Generally Accepted Accounting Principles (GAAP), Statutory Accounting Principles (SAP) of the National Association of Insurance Commissioners (NAIC) or the International Financial Reporting Standards (IFRS).

Or

b. If the Bidder does not produce audited financial statements or file corporate financial information such as a 10-K as part of its routine business practices, as included in point a. above, Bidders may provide unaudited financial information that includes information relating to liquidity, assets, liabilities, equity, working capital, current ratio and net revenue. Bidders must also provide a privately placed debt rating from the NAIC, or an equivalent nationally recognized credit rating agency.

Deloitte LLP and its subsidiaries (the "U.S. Firms") provide audit, advisory, tax, and consulting services through approximately 171,000 people in 106 cities. For the most recent fiscal year ended June 3, 2023, the U.S. Firms had revenue of U.S. \$32.7 billion. See more detailed information in Figure 2-14 below.

Since the U.S. Firms are privately owned partnerships, they do not have audited financial statements, nor do they file other corporate financial information such as a 10-K. Should you have additional questions regarding the financial information, please contact Janet Lewell, Chief Financial Officer, at (212) 436-5655 or Anissa Nelson-Carlisle, Chief Accounting Officer, at (615) 259-1823.

Further, although the U.S. Firms do not have a rating from one of the nationally recognized credit rating agencies, their privately placed debt is assigned a designation by the National Association of Insurance Commissioners ("NAIC"). The U.S. Firms' privately placed debt carries an NAIC 1 designation, NAIC's highest designation, which is comparable to an A or better rating from one of the nationally recognized rating agencies.

Detailed information regarding Deloitte LLP in the U.S. is provided in Figure 2-14 below:

Deloitte LLP and Subsidiaries – By The Numbers			
U.S. Firms	2023	2022	2021
(\$ U.S. billions)			
Offices (national and regional)	134	129	126
People	171,100	156,397	121,693
Consolidated Revenues	\$ 32.7	\$ 27.9	\$ 22.9
Current Assets	\$ 10.6	\$ 10.0	\$ 11.0
Other Assets	9.9	8.2	8.0
Total Assets	\$ 20.5	\$ 18.2	\$ 19.0
Current Liabilities	\$ 7.9	\$ 7.5	\$ 7.4
Other Liabilities	5.7	4.3	5.1
Partnership Equity	6.9	6.4	6.5
Total Liabilities and Partnership Equity	\$ 20.5	\$ 18.2	\$ 19.0
Working Capital	\$ 2.7	\$ 2.5	\$ 3.6
Current Ratio	1.3:1	1.3:1	1.5:1
Consolidated Revenue By Subsidiary			
Deloitte & Touche LLP ⁽¹⁾	28.3%	27.9%	28.0%
Deloitte Consulting LLP	54.4%	54.0%	52.5%
Deloitte Tax LLP	14.6%	15.0%	16.1%
Deloitte Financial Advisory Services LLP ⁽²⁾	2.7%	3.1%	3.4%
<i>(1) Deloitte & Touche LLP services include audit and assurance, accounting and internal controls, cyber and strategic risk, and regulatory and legal support.</i>			
<i>(2) Deloitte Financial Advisory Services LLP services include forensics, valuation and modeling, corporate finance, and mergers and acquisitions.</i>			
<i>Source: Deloitte LLP, New York</i>			

Figure 2-9. Deloitte LLP Financial Information.

The above financial information was prepared for internal purposes. This financial information has not been audited and does not present the financial position, results of operations, or other financial information in accordance with generally accepted accounting principles. The use of this information is restricted to your consideration in

providing you professional services. Any other use or circulation of this information is prohibited.

Debt rating

As a privately held organization, the U.S. Firms do not have a rating from one of the nationally recognized credit rating agencies (e.g., Moody's and S&P). However, their privately placed debt is assigned a designation by the National Association of Insurance Commissioners ("NAIC"). The U.S. Firms' privately placed debt carries an NAIC-1 designation, which is comparable to an A- from one of the nationally recognized rating agencies.

2.2.2 Dun & Bradstreet Number and Report

5.2.1.3 Firm Financial Qualifications

F7

The Bidder must also provide a copy of its Dun & Bradstreet (D&B) D-U-N-S number and Business Information Report, inclusive of its D&B viability and credit ratings.

We have provided a copy of our Dun and Bradstreet Report (DUNS # 01-412-7109) Business Information Report on the pages that follow. This enables the Evaluation Committee to further assess our financial stability.



Business Information Report Snapshot

DELOITTE LLP

D-U-N-S: 01-412-7109
ADDRESS: 30 Rockefeller Plz Fl 41, New York, NY, 10112, United States
Date: 07/01/2024

RISK ASSESSMENT

SCORES AND RATINGS				
Max. Credit Recommendation	PAYDEX® SCORE	Delinquency Predictor Percentile	Financial Stress Percentile	Supplier Evaluation Risk Rating
US\$ 5,300,000	79 LOW RISK	69 MODERATE RISK	54 MODERATE RISK	3 LOW RISK

MAXIMUM CREDIT RECOMMENDATION

Overall Business Risk

LOW

LOW-MODERATE

MODERATE

MODERATE-HIGH

HIGH

Maximum Credit Recommendation

US\$ 5,300,000

The recommended limit is based on a low-moderate probability of severe delinquency.

Dun & Bradstreet Thinks...

- Overall assessment of this organization over the next 12 months: STABLE CONDITION
- Based on the predicted risk of business discontinuation: LIKELIHOOD OF CONTINUED OPERATIONS
- Based on the predicted risk of severely delinquent payments: MODERATE POTENTIAL FOR SEVERELY DELINQUENT PAYMENTS

PAYDEX® SUMMARY

3 Months

79

Low Risk (100) High Risk (1)

When weighted by dollar amount, payments to suppliers average 2 days beyond terms. Value is based on payments collected over the last **3 months**.

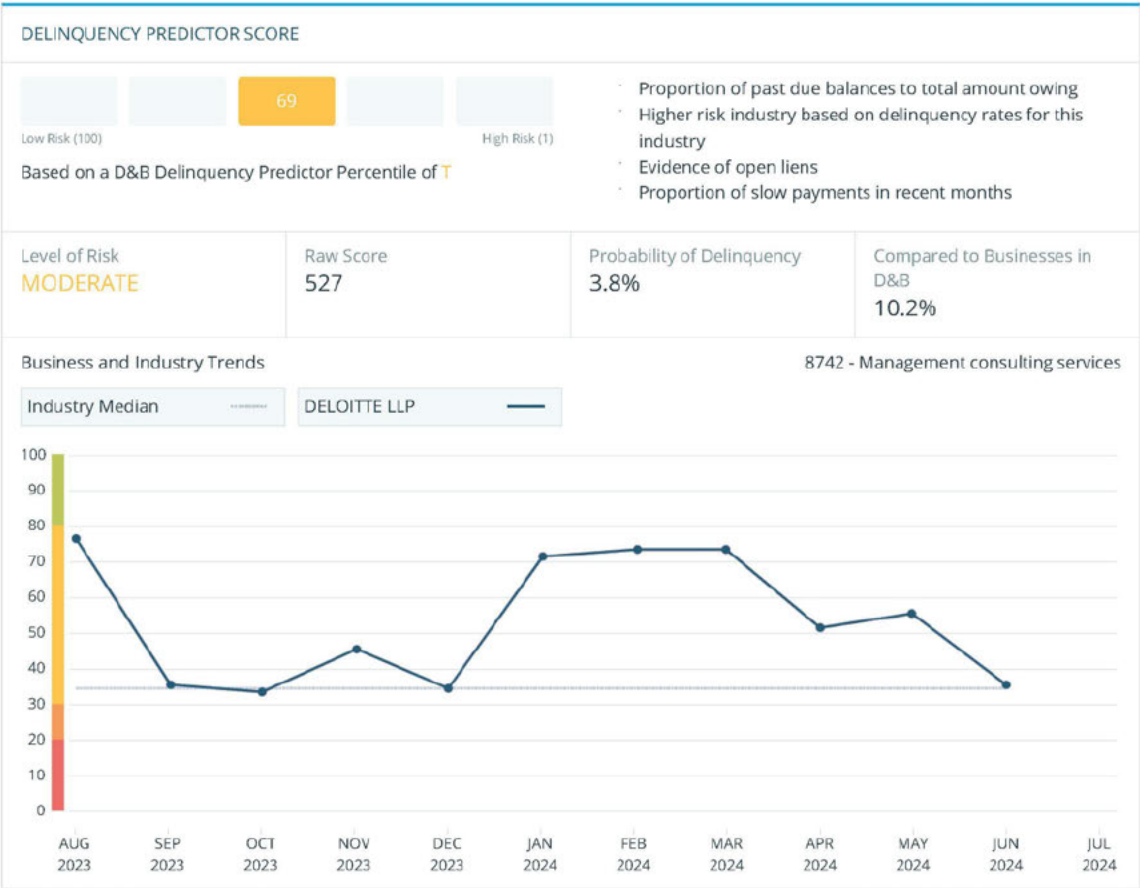
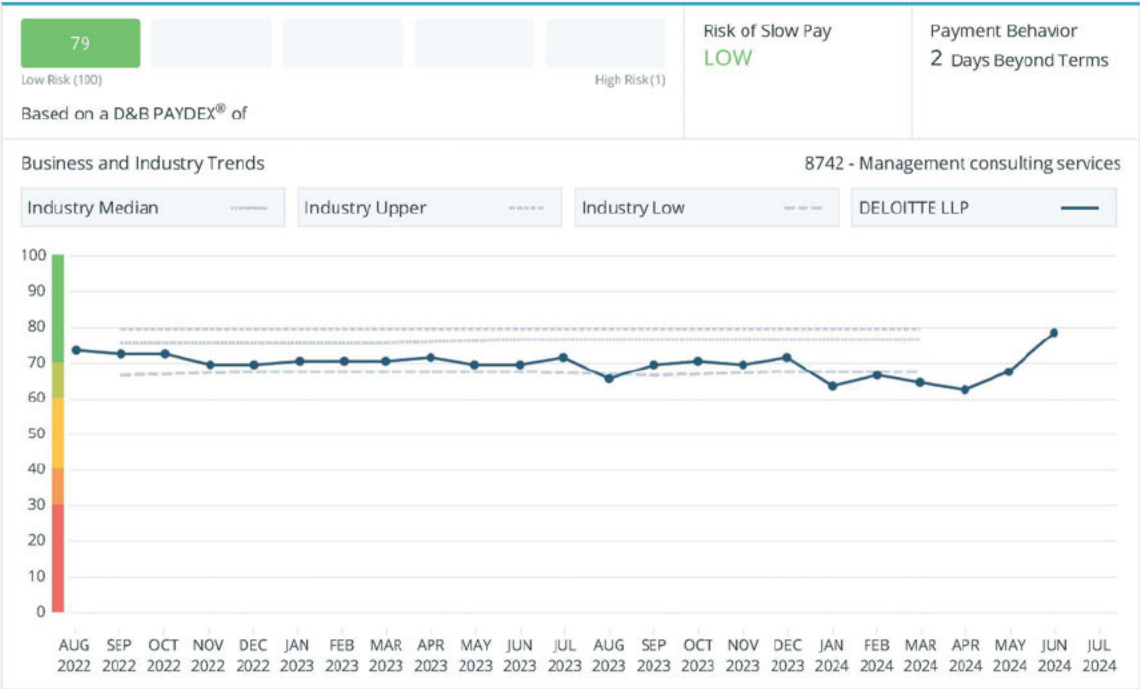
24 Months

79

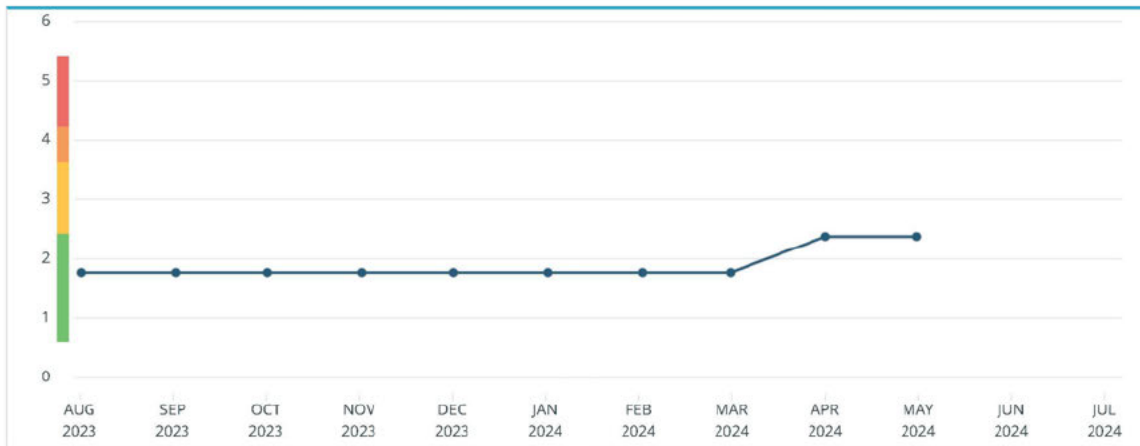
Low Risk (100) High Risk (1)

When weighted by dollar amount, payments to suppliers average 2 days beyond terms. Value is based on payments collected over the last **24 months**.

PAYDEX®	Based on 24 months of data
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D&B RATING

Current Rating as of 04-08-2024

Employee Size

1R: 10 employees and over

Risk Indicator

3: Moderate Risk

Previous Rating

Employee Size

1R: 10 employees and over

Risk Indicator

4: Higher than Average Risk

TRADE PAYMENTS

TRADE PAYMENTS SUMMARY			Based on 24 months of data
Overall Payment Behavior 2 Days Beyond Terms	% of Trade Within Terms 65%	Highest Past Due US\$ 500,000	
Highest Now Owing: US\$ 50,000,000	Total Trade Experiences: 149 Largest High Credit: US\$ 50,000,000 Average High Credit: US\$ 711,566	Total Unfavorable Comments: 0 Largest High Credit: US\$ 0 Total Placed in Collections: 2 Largest High Credit: US\$ 0	

TRADE PAYMENTS BY CREDIT EXTENDED			
\$ CREDIT EXTENDED	% OF PAYMENTS WITHIN TERMS	# PAYMENT EXPERIENCES	TOTAL & DOLLAR AMOUNT
OVER 100,000	97%	15	\$53,950,000
50,000 - 100,000	25%	5	\$400,000
15,000 - 49,999	82%	12	\$295,000
5,000 - 14,999	64%	15	\$117,500
1,000 - 4,999	74%	14	\$23,000
UNDER 1,000	78%	16	\$5,100

TRADE PAYMENTS BY INDUSTRY			
Collapse All Expand All			
Industry Category	Number of Payment Experiences	Largest High Credit (US\$)	% Within Terms (Expand to View)
99 - Nonclassifiable Establishments	12	50,000,000	
9999 - Nonclassified	12	50,000,000	100
93 - Public Finance Taxation And Monetary Policy	11	60,000	
9311 - Public Finance	11	60,000	100
73 - Business Services	12	500,000	
7372 - Prepackaged Software	6	500,000	50

7361 - Employment Agency	2	400,000	100
7371 - Custom Programming	1	200,000	100
7374 - Data Processing Svcs	1	100,000	50
7363 - Help Supply Service	1	25,000	100
7389 - Misc Business Service	1	250	0
48 - Communications	7	10,000	
4813 - Telephone Communictns	6	750	100
4812 - Radiotelephone Commun	1	10,000	0
35 - Industrial And Commercial Machinery And Computer Equipment	11	1,000,000	
3579 - Mfg Misc Office Eqpt	5	10,000	15
3572 - Mfg Computer Storage	4	200,000	56
3571 - Mfg Computers	2	1,000,000	5
61 - Nondepository Credit Institutions	4	100,000	
6153 - Short-trm Busn Credit	3	15,000	50
6159 - Misc Business Credit	1	100,000	100
50 - Wholesale Trade - Durable Goods	2	200,000	
5045 - Whol Computers/softwr	2	200,000	37
27 - Printing, Publishing And Allied Industries	2	85,000	
2711 - Newspaper-print/publ	2	85,000	0
51 - Wholesale Trade - Nondurable Goods	3	2,500	
5113 - Whol Service Paper	2	1,000	60
5192 - Whol Books/newspapers	1	2,500	100
47 - Transportation Services	2	1,000	
4731 - Arrange Cargo Transpt	2	1,000	91
60 - Depository Institutions	2	100	
6021 - Natnl Commercial Bank	2	100	100
45 - Transportation By Air	1	250,000	
4512 - Scheduled Air Trans	1	250,000	100
87 - Engineering Accounting Research Management And Related Services	2	100,000	
8748 - Business Consulting	1	100,000	50
8734 - Testing Laboratory	1	90,000	50

↘55 - Automotive Dealers And Gasoline Service Stations	1	45,000	
5511 - Ret New/used Autos	1	45,000	100
↘81 - Legal Services	1	30,000	
8111 - Legal Services	1	30,000	0
↘42 - Motor Freight Transportation And Warehousing	1	2,500	
4212 - Lcl Truck-w/o Storage	1	2,500	100
↘70 - Hotels Rooming Houses Camps And Other Lodging Places	1	2,500	
7011 - Hotel/motel Operation	1	2,500	100
↘59 - Miscellaneous Retail	1	500	
5943 - Ret Stationery	1	500	100
↘25 - Furniture And Fixtures	1	250	
2522 - Mfg Nonwd Office Furn	1	250	100

TRADE LINES						
Date of Experience	Payment Status	Selling Terms	High Credit (US\$)	Now Owes (US\$)	Past Due (US\$)	Months Since Last Sale
06/2024	Prompt to Slow	-	100,000	0	0	1 Month
06/2024	Slow	N30	85,000	75,000	75,000	Between 2 and 3 Months
06/2024	Slow	N30	5,000	0	0	Between 2 and 3 Months
05/2024	Prompt	-	600,000	600,000	2,500	1 Month
05/2024	Prompt	-	400,000	200,000	0	1 Month
05/2024	Prompt	-	100,000	100,000	0	1 Month
05/2024	Prompt	-	45,000	40,000	0	1 Month
05/2024	Prompt	-	30,000	0	0	Between 2 and 3 Months
05/2024	Prompt	N60	25,000	20,000	1,000	1 Month
05/2024	Prompt	-	15,000	0	0	Between 6 and 12 Months
05/2024	Prompt	-	15,000	0	0	Between 4 and 5 Months
05/2024	Prompt	-	15,000	7,500	0	1 Month
05/2024	Prompt	-	5,000	5,000	0	-

05/2024	Prompt	-	2,500	2,500	0	1 Month
05/2024	Prompt	-	2,500	0	0	Between 2 and 3 Months
05/2024	Prompt	-	2,500	2,500	0	1 Month
05/2024	Prompt	-	1,000	0	0	Between 6 and 12 Months
05/2024	Prompt	-	750	0	0	Between 2 and 3 Months
05/2024	Prompt	-	500	0	0	Between 4 and 5 Months
05/2024	Prompt	-	500	0	0	Between 4 and 5 Months
05/2024	Prompt	-	250	250	0	1 Month
05/2024	Prompt	-	250	250	0	1 Month
05/2024	Prompt	-	250	0	0	Between 2 and 3 Months
05/2024	Prompt	-	250	100	0	1 Month
05/2024	Prompt	-	100	0	0	Between 6 and 12 Months
05/2024	Prompt	-	50	50	0	1 Month
05/2024	Prompt to Slow	-	7,500	7,500	7,500	1 Month
05/2024	Prompt to Slow	-	2,500	2,500	0	1 Month
05/2024	Prompt to Slow	-	100,000	1,000	1,000	Between 6 and 12 Months
05/2024	Prompt to Slow	-	200,000	25,000	0	1 Month
05/2024	Prompt to Slow	-	90,000	90,000	0	1 Month
05/2024	Prompt to Slow	-	10,000	0	0	Between 6 and 12 Months
05/2024	Prompt to Slow	-	2,500	0	0	Between 2 and 3 Months
05/2024	Prompt to Slow	-	1,000	0	0	Between 4 and 5 Months
05/2024	Slow	-	1,000	750	750	1 Month
05/2024	Slow	-	1,000	0	0	Between 6 and 12 Months
05/2024	Slow	-	10,000	10,000	10,000	1 Month
05/2024	Slow	-	750	750	750	-
05/2024	placed for collection	-	2,500	2,500	2,500	-

05/2024	-	Cash Account	1,000	0	0	1 Month
05/2024	-	Cash Account	750	0	0	1 Month
05/2024	-	Cash Account	250	-	-	1 Month
05/2024	-	Cash Account	50	-	-	1 Month
05/2024	-	Cash Account	50	-	-	1 Month
05/2024	-	Cash Account	50	-	-	1 Month
05/2024	-	Cash Account	50	-	-	1 Month
05/2024	-	Cash Account	50	-	-	1 Month
05/2024	-	Cash Account	0	0	0	1 Month
04/2024	Prompt	-	250	0	0	Between 6 and 12 Months
04/2024	-	Cash Account	250	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	100	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
04/2024	-	Cash Account	50	-	-	1 Month
03/2024	Prompt	-	5,000	5,000	0	1 Month
03/2024	Prompt	-	1,000	1,000	0	1 Month
03/2024	-	Cash Account	100	-	-	1 Month
03/2024	-	Cash Account	50	-	-	1 Month
03/2024	-	Cash Account	50	-	-	1 Month
03/2024	-	Cash Account	50	-	-	1 Month
03/2024	-	Cash Account	50	-	-	1 Month
02/2024	Prompt	-	60,000	-	-	1 Month

02/2024	Prompt	-	7,500	-	-	1 Month
01/2024	-	Cash Account	50	-	-	1 Month
01/2024	-	Cash Account	50	-	-	1 Month
12/2023	Prompt	-	200,000	0	0	Between 4 and 5 Months
07/2023	Prompt	-	2,500	2,500	0	1 Month
07/2023	Slow	-	30,000	0	0	Between 6 and 12 Months
06/2023	Prompt	-	1,000	0	0	Between 6 and 12 Months
03/2023	Prompt	-	100	0	0	Between 6 and 12 Months
08/2022	Prompt	-	500	0	0	Between 6 and 12 Months

EVENTS

LEGAL EVENTS			
The following Public Filing data is for information purposes only and is not the official record. Certified copies can only be obtained from the official source.			
SUITS	JUDGEMENTS	LIENS	UCC FILINGS
TOTAL 0	TOTAL 0	TOTAL 1	TOTAL 17
LAST FILING DATE -	LAST FILING DATE -	LAST FILING DATE 05/08/2015	LAST FILING DATE 06/13/2022

General: The public record items contained in this report may have been paid, terminated, vacated or released prior to the date this was reported. This information may not be reproduced in whole or in part by any means of reproduction.

UCC Filings: There may be additional UCC Filings in the D&B file on this company which are available by contacting 1-800-234-3867.

Suits, Liens, Judgements: There may be additional suits, liens, or judgements in D&B's file on this company available in the U.S. Public Records Database that are also covered under your contract. If you would like more information on this database, please contact the Customer Resource Center at 1-800-234-3867.

Lien: A lien holder can file the same lien in more than one filing location. The appearance of multiple liens filed by the same lien holder against a debtor may be indicative of such an occurrence.

EVENTS	
Lien - Tax Lien	
Filing Date	2015-05-08
Filing Number	2026/714
Status	Open
Date Status Attained	2015-05-08
Received Date	2015-06-25
Amount	563
Debtors	DELOITTE LLP
Creditors	SOUTH CAROLINA DEPARTMENT OF REVENUE
Court	RICHLAND COUNTY REGISTER OF DEEDS, COLUMBIA, SC
UCC Filing - Original	
Filing Date	2022-06-13
Filing Number	220201642620
Received Date	2022-06-21
Collateral	Equipment and proceeds
Secured Party	SOLAR MOSAIC LLC, OAKLAND, CA

Debtors	MAHAJAN, PRERNA, ROSEVILLE, CA
Filing Office	SECRETARY OF STATE/UCC DIVISION, SACRAMENTO, CA
UCC Filing - Original	
Filing Date	2011-06-23
Filing Number	2011 2422361
Received Date	2011-07-13
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2011-03-31
Filing Number	2011 1203010
Received Date	2011-04-20
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-09-20
Filing Number	2010 3271685
Received Date	2010-10-14
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-08-24
Filing Number	2010 2959314
Received Date	2010-09-15
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP

Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-08-10
Filing Number	2010 2771933
Received Date	2010-09-01
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-06-23
Filing Number	2010 2194342
Received Date	2010-07-22
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-06-21
Filing Number	2010 2155210
Received Date	2010-07-22
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE
UCC Filing - Original	
Filing Date	2010-06-15
Filing Number	2010 2081051
Received Date	2010-07-14
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE

UCC Filing - Original

Filing Date	2010-06-14
Filing Number	2010 2065633
Received Date	2010-07-14
Collateral	Leased Computer equipment and proceeds
Secured Party	IBM CREDIT LLC, ARMONK, NY
Debtors	DELOITTE LLP
Filing Office	SECRETARY OF STATE/UCC DIVISION, DOVER, DE

COMPANY EVENTS

The following information was reported on: 05-13-2024

The Delaware Secretary of State's business registrations file showed that Deloitte LLP was registered as a Limited Liability Partnership on August 15, 1994, under file registration number 2426319.

Business started 1994.

RECENT EVENTS:

On August 30, 2023, an inside source stated that Deloitte LLP, New York, NY, has acquired a certain assets of Optimal Design Co., Arlington Heights, IL, on May 22, 2023. With the acquisition, Optimal Design Co will operate as a subsidiary of Deloitte LLP. The employees and the management were retained. Terms of the transaction were not disclosed.

On July 7, 2021, sources stated that Deloitte LLP, New York, NY, through its subsidiary, Deloitte & Touche LLP, New York, NY, has acquired substantially all the assets of CloudQuest Inc., Cupertino, CA, on June 7, 2021. With the acquisition, CloudQuest Inc. ceased to exist as a legal entity and all operations were integrated into Deloitte LLP. Terms of the deal were not disclosed. Further details are unavailable.

On September 24, 2018, sources stated that Deloitte LP, New York, NY, has acquired the artificial intelligence platform business of Magnetic Media Online, Inc., New York, NY, on September 10, 2018. Terms of the deal were not disclosed. Further details are unavailable.

On March 17, 2016, sources stated that Deloitte LLP, New York, NY, has acquired substantially all of the assets of Heat Ventures LLC, San Francisco, CA, on February 29, 2016. With the acquisition, Heat Ventures LLC will now operate as a subsidiary of Deloitte LLP. Employees and management were retained. Terms of the deal were not disclosed. Further details are unavailable.

On July 31, 2015, sources stated that Deloitte, LLP, New York, NY, has acquired System Dynamics Group Limited, Dublin, Ireland, on July 14, 2015. Terms were undisclosed.

On November 28, 2012, sources stated that Deloitte LLP, New York, NY, has acquired Recombinant Data Corp., Newton, MA, on October 29, 2012. With this acquisition, Recombinant Data Corp. will no longer operate as a legal entity and all operations were integrated into Deloitte LLP. Terms of the deal were not disclosed. Further details are unavailable.

On January 31, 2012, an inside source stated that Deloitte LLP, New York, NY, announced the acquisition of Ubermind Inc., Seattle, WA, on January 4, 2012. Ubermind Inc. will now operate as a subsidiary of Deloitte LLP. Terms of the deal were not disclosed. Further details are unavailable.

On January 28, 2011, sources stated that Deloitte LLP, New York, NY, has acquired substantially all of the assets of Altos Management Partners, Inc., Los Altos, CA, on January 14, 2011. With this acquisition, Altos Management Partners, Inc. will operate as a subsidiary of Deloitte LLP. Further details were not available.

On December 20, 2010, an inside source stated that Clear Carbon Consulting Inc., Arlington, VA, has merged with and into Deloitte LLP, New York, NY, on December 13, 2010, with Deloitte LLP being the surviving entity. With this merger, Clear Carbon Consulting Inc. discontinued its operations and this location now operates as a branch of Deloitte LLP. The employees and management were retained at this time. Further details are not disclosed.

On December 20, 2010, an inside source stated that Domani Sustainability Consulting Service, Central Islip, NY, has merged with and into Deloitte LLP, New York, NY, on December 13, 2010, with Deloitte LLP being the surviving entity. With this merger, Domani Sustainability Consulting Service discontinued its business and its operations were integrated into Deloitte LLP. The employees and management were retained at this time. Further details are not disclosed.

On May 14, 2009, sources stated that Deloitte LLP, New York, NY, has closed the acquisition of substantially all of the assets of North American Public Services business of BearingPoint's, Mc Lean, VA, on May 8, 2009. Further details were not disclosed.

On April 17, 2009, sources stated that Deloitte LLP, New York, NY, completed the acquisition of substantially all of the assets of Solbourne Computer, Inc., Boulder, CO, on July 17, 2008. With this transaction, Solbourne Computer, Inc. discontinued its business and operations of Solbourne Computer, Inc. were integrated into Deloitte Consulting LLP., New York, NY, a subsidiary of Deloitte LLP. No operations will remain at the previous location of Solbourne Computer, Inc. Employees and management of Solbourne Computer, Inc. have joined Deloitte Consulting LLP. Further details are unavailable.

Business name was changed from Deloitte & Touche USA LLP to Deloitte LLP on March 14 2008.

JOSEPH UCUZOGLU. Antecedents are unknown.

TRINA HUELSMAN. Served as audit and enterprise risk services leader for the process and industrial products sector.

KENNY SMITH. Served as principal of Deloitte Consulting LLP.

RODNEY SIDES. Antecedents are unknown.

FRANK FRIEDMAN. 2011-present active here.

SCOTT BARET. Antecedents are unknown.

AFFILIATES: The following are related through common principals, management and/or ownership: Deloitte Touche Tohmatsu Services, Inc., New York, NY. Started '1992'. DUNS #938342565. Operates as accounting, auditing and bookkeeping services.

Deloitte Financial Advisory Services India Private Limited DUNS #860254336.

SPECIAL EVENTS

05-13-2024 MERGER/ACQUISITION:

According to published reports on July 26, 2023, Deloitte, DUNS 014127109, (New York, NY) announced the acquisition of Hacktive. MERGER/ACQUISITION: According to published reports on May 31, 2023, Deloitte, DUNS 014127109, (New York, NY) announced that it has acquired substantially all of the assets of Optimal Design Co., DUNS 137612896, (Arlington Heights, IL). MERGER/ACQUISITION: According to published reports on February 3, 2023, Deloitte, DUNS 014127109, (New York, NY) announced that it has completed its acquisition of Reformis, (London, United Kingdom) for an undisclosed sum.

Financials

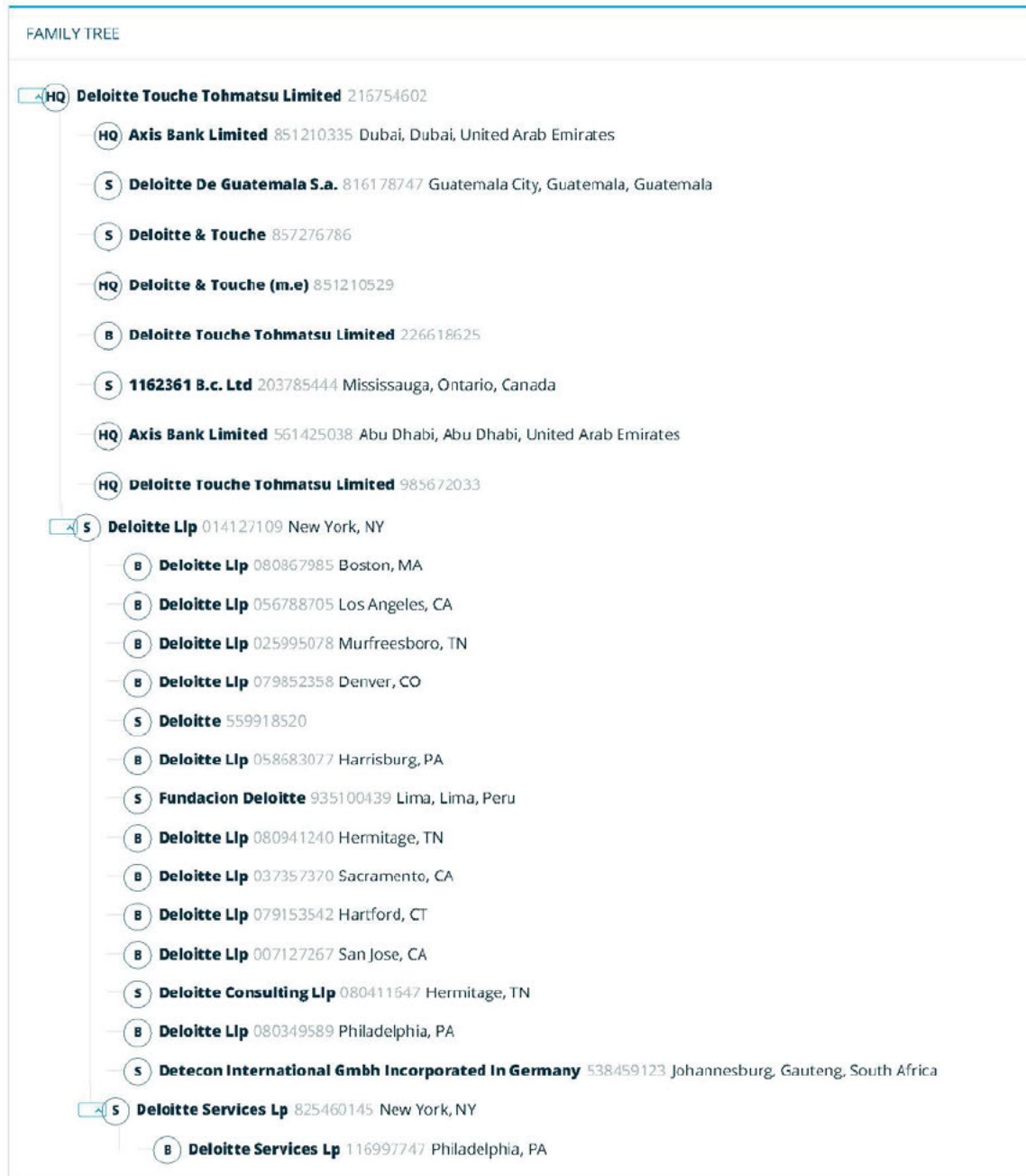
D&B currently has no financial information on file for this company.

COMPANY PROFILE

COMPANY OVERVIEW		
D-U-N-S 01-412-7109	Mailing Address 30 Rockefeller Plz Fl 41, New York NY 10112, US	Annual Sales -
Business Form Unknown	Telephone (212) 492-4000	Employees 65,300
Date Incorporated -	Fax -	Age (Year Started) 30 years (1994)
State of Incorporation Delaware	Website -	Named Principal JOSEPH UCUZOGLU, CEO
Ownership -	Line of Business Management consulting services	SIC 8742

OWNERSHIP

FAMILY TREE SUMMARY		
Members in the Tree	Subsidiaries of this Company	Branches of this Company
405	62	333



- ☐ **B Deloitte Services Lp** 119285909 Atlanta, GA
- ☐ **B Deloitte Services Lp** 081123215 Mechanicsburg, PA
- ☐ **B Deloitte Services Lp** 116982060 Tampa, FL
- ☐ **B Deloitte Services Lp** 080624550 Dallas, TX
- ☐ **B Deloitte Services Lp** 611259888 Hermitage, TN
- ☐ **S Deloitte & Touche** 850514920
- ☐ **B Deloitte Llp** 114803820 Denver, CO
- ☐ **B Deloitte Llp** 832996263 Boston, MA
- ☐ **S Deloitte Consulting (global) Llc** 829981914 New York, NY
- ☐ **B Deloitte Llp** 052186698 Santa Fe, NM
- ☐ **B Deloitte Llp** 034627226 Woodland Hills, CA
- ☒ **S Deloitte Consulting Llp** 002563455 New York, NY
 - ☐ **B Deloitte Consulting Llp** 117635472 Mechanicsburg, PA
 - ☐ **B Deloitte Consulting Llp** 117544829 Austin, TX
 - ☐ **B Deloitte Consulting Llp** 118728943 New York, NY
 - ☐ **B Deloitte Consulting Llp** 019877799 Panama City, FL
 - ☐ **B Deloitte Consulting Llp** 081233505 San Jose, CA
 - ☐ **B Deloitte Consulting Llp** 081149596 Houston, TX
 - ☐ **B Deloitte Consulting Llp** 787981237 Princeton, NJ
 - ☐ **S Hvsf Transition, Llc** 942847849 San Francisco, CA
 - ☐ **B Deloitte Consulting Llp** 019189004 Mclean, VA
 - ☐ **B Deloitte Consulting Llp** 100943369 Harrisburg, PA
 - ☐ **B Deloitte Consulting Llp** 122585263 Glen Mills, PA
 - ☐ **B Deloitte Consulting Llp** 117533803 Charlotte, NC
 - ☐ **S Sentek Consulting, Inc.** 092189385 San Diego, CA
 - ☐ **B Deloitte Consulting Llp** 148748879 Houston, TX
 - ☐ **B Deloitte Consulting Llp** 118817479 Morristown, NJ
 - ☐ **B Deloitte Consulting Llp** 038052994 Boston, MA
 - ☐ **B Deloitte Consulting Llp** 008655620 Los Angeles, CA
 - ☐ **B Deloitte Consulting Llp** 026210091 Pittsburgh, PA
 - ☐ **B Deloitte Consulting Llp** 795656763 Tallahassee, FL
 - ☐ **B Deloitte Consulting Llp** 117119640 San Diego, CA
 - ☐ **B Deloitte Consulting Llp** 019883300 Dayton, OH
 - ☐ **S Deloitte Consulting Extended Business Services Llc** 807929919 Arlington, VA
 - ☐ **B Deloitte Consulting Llp** 081233506 Modesto, CA

- ☐ **Deloitte Consulting Llp** 117358475 Richmond, VA
- ☐ **Deloitte Consulting Llp** 117406766 Atlanta, GA
- ☐ **Deloitte Consulting Llp** 035644769 Costa Mesa, CA
- ☐ **Deloitte Consulting Llp** 832622653 Arlington, VA
- ☐ **Deloitte Consulting Llp** 118214173 Camp Hill, PA
- ☐ **Deloitte Consulting Llp** 962439068 Arlington, VA
- ☐ **Deloitte Consulting Llp** 050972847 Cleveland, OH
- ☐ **Deloitte Consulting Llp** 832763663 Lexington Park, MD
- ☐ **Deloitte Consulting Llp** 019121586 Arlington, VA
- ☒ **Monitor Company Group Gp Llc** 106768153 West Berlin, NJ
 - ☐ **Monitor Company Group Gp Llc** 831863092 New York, NY
 - ☐ **Monitor Company Group Gp Llc** 361210904 San Francisco, CA
 - ☐ **Monitor Company Group Gp Llc** 059045023 Miami, FL
 - ☐ **Monitor Gp Ia, Inc.** 113855790 Saint Paul, MN
 - ☐ **Monitor Company Group Gp Llc** 009321501 Chicago, IL
 - ☐ **Monitor Company** 434769774 Roma, Roma, Italy
 - ☐ **Monitor Company Group, Lp** 867800252 Boston, MA
 - ☐ **Monitor Company Canada** 248294381 Toronto, Ontario, Canada
- ☐ **Deloitte Consulting Llp** 019878284 Pensacola, FL
- ☐ **Deloitte Consulting Llp** 969789465 Philadelphia, PA
- ☐ **Deloitte Consulting Llp** 117338001 Mechanicsburg, PA
- ☐ **Deloitte Consulting Llp** 117242977 Lake Mary, FL
- ☐ **Deloitte Consulting Llp** 117403558 Parsippany, NJ
- ☐ **Deloitte Consulting Llp** 117443493 Miami, FL
- ☐ **Deloitte Consulting Llp** 117341894 Lake Mary, FL
- ☐ **Deloitte Consulting Llp** 833759207 Austin, TX
- ☐ **Deloitte Consulting Llp** 032201825 New York, NY
- ☐ **Deloitte Consulting Product Services Llc** 625121897 Hermitage, TN
- ☐ **Deloitte Consulting Llp** 133194774 Austin, TX
- ☐ **Deloitte Consulting Llp** 832665529 McLean, VA
- ☐ **Deloitte Consulting Llp** 136204760 San Antonio, TX
- ☐ **Deloitte Consulting Llp** 080304646 Stamford, CT
- ☐ **Deloitte Consulting Llp** 603398574 Seattle, WA
- ☐ **Deloitte Consulting Llp** 117529658 Huntsville, AL
- ☐ **Deloitte Consulting Llp** 117221472 Dallas, TX

- ☐ **B Deloitte Consulting Llp** 117427374 Tampa, FL
- ☐ **B Deloitte Consulting Llp** 118862559 Louisville, KY
- ☐ **B Deloitte Consulting Llp** 808912500 Glen Mills, PA
- ☐ **B Deloitte Consulting Llp** 117829835 Austin, TX
- ☐ **B Deloitte Consulting Llp** 081524982 Gilbert, AZ
- ☐ **B Deloitte Consulting Llp** 136765869 Chicago, IL
- ☐ **B Deloitte Consulting Llp** 116841582 Annapolis Junction, MD
- ☐ **B Deloitte Consulting Llp** 078717377 San Francisco, CA
- ☒ **S Odd Future, Inc.** 137612896 Arlington Heights, IL
 - ☐ **B Odd Future, Inc.** 089546960 Chicago, IL
 - ☐ **B Odd Future, Inc.** 080412688 Chicago, IL
- ☐ **S Deloitte Consulting Llc** 690171442 Seoul, Seoul, Republic Of Korea
- ☐ **B Deloitte Llp** 072053697 Indianapolis, IN
- ☐ **S Deloitte Yousuf Adil** 645726865 Karachi, Sindh, Pakistan
- ☐ **B Deloitte Llp** 836465349 Camp Hill, PA
- ☐ **B Deloitte Llp** 081312384 New York, NY
- ☐ **B Deloitte Llp** 088738099 Independence, OH
- ☐ **B Deloitte Llp** 080184939 Tampa, FL
- ☒ **S Deloitte Tax Llp** 168165327 New York, NY
 - ☐ **B Deloitte Tax Llp** 080029941 Dallas, TX
 - ☐ **B Deloitte Tax Llp** 081184847 Philadelphia, PA
 - ☐ **B Deloitte Tax Llp** 080189336 San Juan, PR
 - ☐ **B Deloitte Tax Llp** 046128650 Atlanta, GA
 - ☐ **B Deloitte Tax Llp** 032418199 Davenport, IA
 - ☐ **B Deloitte Tax Llp** 781102350 Washington, DC
 - ☐ **S Deloitte Tax Products Company Llc** 118326663 San Francisco, CA
 - ☐ **B Deloitte Tax Llp** 964610054 San Jose, CA
 - ☐ **B Deloitte Tax Llp** 117249942 Hermitage, TN
 - ☐ **B Deloitte Tax Llp** 080570207 Los Angeles, CA
 - ☐ **B Deloitte Tax Llp** 116817801 Hartford, CT
 - ☐ **B Deloitte Tax Llp** 116970818 Salt Lake City, UT
 - ☐ **B Deloitte Tax Llp** 964609916 San Francisco, CA
 - ☐ **B Deloitte Tax Llp** 081255708 Boston, MA
 - ☐ **B Deloitte Tax Llp** 117057512 Minneapolis, MN
 - ☐ **B Deloitte Tax Llp** 081311106 Houston, TX

- ☐ **B Deloitte Tax Llp** 081555723 Detroit, MI
- ☐ **S Deloitte Tax Eu Privacy Rep Limited** 985718359
- ☐ **B Deloitte Tax Llp** 081497923 Boise, ID
- ☐ **B Deloitte Tax Llp** 828881354 Arlington, VA
- ☐ **B Deloitte Tax Llp** 808073725 New York, NY
- ☐ **B Deloitte Tax Llp** 828881552 Mc Lean, VA
- ☐ **B Deloitte Tax Llp** 117135212 Miami, FL
- ☐ **B Deloitte Llp** 046725405 New York, NY
- ☐ **S Deloitte Consulting (holding Sub) Llc** 118968036 Detroit, MI
- ☐ **S Deloitte Limited** 850458760
- ☐ **B Deloitte Llp** 117167305 Morristown, NJ
- ☐ **B Deloitte Llp** 079844800 Jericho, NY
- ☐ **S Deloitte Ltd.** 875650277
- ☐ **S Deloitte & Touche Llp** 855024428
- ☒ **S Deloitte & Touche Llp** 001664820 New York, NY
- ☐ **S Deloitte Touche Tohmatsu** 761018852
- ☐ **B Deloitte & Touche Llp** 061259164 Fresno, CA
- ☐ **B Deloitte & Touche Llp** 083657718 Washington, DC
- ☐ **B Deloitte & Touche Llp** 080583124 Indianapolis, IN
- ☐ **B Deloitte & Touche Llp** 038235524 Seattle, WA
- ☐ **B Deloitte & Touche Llp** 134148782 Boca Raton, FL
- ☐ **B Deloitte & Touche Llp** 069455579 Pittsburgh, PA
- ☐ **B Deloitte & Touche Llp** 144721529 Rogers, AR
- ☐ **S Mmd Holdings, Llc** 080695876 Quincy, MA
- ☐ **B Deloitte & Touche Llp** 081192061 Morrisville, NC
- ☐ **B Deloitte & Touche Llp** 127377323 Raleigh, NC
- ☐ **S Compliance Implementation Services, Llc** 024832158 Morrisville, NC
- ☐ **B Deloitte & Touche Llp** 039689252 San Francisco, CA
- ☐ **B Deloitte & Touche Llp** 049417009 Boston, MA
- ☐ **S Deloitte And Touche** 535299713
- ☐ **B Deloitte & Touche Llp** 050235548 Saint Louis, MO
- ☐ **B Deloitte & Touche Llp** 030655526 Kansas City, MO
- ☐ **B Deloitte & Touche Llp** 039503115 Costa Mesa, CA
- ☐ **B Deloitte & Touche Llp** 079722424 Huntsville, AL
- ☐ **B Deloitte & Touche Llp** 078673682 Pleasanton, CA

- ☐ **B Deloitte & Touche Lip** 052971553 San Jose, CA
- ☐ **S Deloitte & Touche (liquidator)** 864379144 George Town, Grand Cayman, Cayman Islands
- ☐ **B Deloitte & Touche Lip** 806184834 Cleveland, OH
- ☐ **B Deloitte & Touche Lip** 021411764 Portland, OR
- ☐ **B Deloitte & Touche Lip** 081288382 Jersey City, NJ
- ☐ **B Deloitte & Touche Lip** 799004754 Elkridge, MD
- ☐ **B Deloitte & Touche Lip** 085071397 Hartford, CT
- ☐ **B Deloitte & Touche Lip** 967765520 Concord, NH
- ☐ **B Deloitte & Touche Lip** 014106160 Miami, FL
- ☐ **B Deloitte & Touche Lip** 116912058 Lake Mary, FL
- ☐ **B Deloitte & Touche Lip** 072591456 Grand Rapids, MI
- ☐ **B Deloitte & Touche Lip** 116943935 Harrisburg, PA
- ☐ **B Deloitte & Touche Lip** 074734526 Cincinnati, OH
- ☐ **B Deloitte & Touche Lip** 828881412 Mclean, VA
- ☐ **B Deloitte & Touche Lip** 080583108 San Francisco, CA
- ☐ **B Deloitte & Touche Lip** 826525870 New Orleans, LA
- ☒ **S Deloitte Development Llc** 078882646 Hermitage, TN
- ☐ **B Deloitte Development Llc** 080122834 Philadelphia, PA
- ☐ **B Deloitte & Touche Lip** 080583113 Austin, TX
- ☐ **B Deloitte & Touche Lip** 075029090 Columbus, OH
- ☐ **B Deloitte & Touche Lip** 084309264 Dallas, TX
- ☐ **B Deloitte & Touche Lip** 080540302 Mechanicsburg, PA
- ☐ **B Deloitte & Touche Lip** 051083688 Memphis, TN
- ☐ **B Deloitte & Touche Lip** 118954093 Cedar Rapids, IA
- ☐ **B Deloitte & Touche Lip** 080583176 Denver, CO
- ☐ **S St Net, Inc.** 083139639 Mc Lean, VA
- ☐ **B Deloitte & Touche Lip** 145885310 Stamford, CT
- ☐ **B Deloitte & Touche Lip** 004478723 Dayton, OH
- ☐ **B Deloitte & Touche Lip** 001693738 Los Angeles, CA
- ☐ **B Deloitte & Touche Lip** 087268017 Davenport, IA
- ☐ **B Deloitte & Touche L.I.p.** 149326915 San Francisco, CA
- ☐ **B Deloitte & Touche Lip** 010518314 Jacksonville, FL
- ☐ **B Deloitte & Touche Lip** 802312751 Detroit, MI
- ☐ **B Deloitte & Touche Lip** 080583190 Washington, DC
- ☐ **B Deloitte & Touche Lip** 086304318 Richmond, VA

- ☐ **Deloitte & Touche Lip** 097601396 Bellevue, WA
- ☐ **Deloitte & Touche Lip** 080156047 Tulsa, OK
- ☐ **Deloitte & Touche Lip** 103997651 Waltham, MA
- ☐ **Deloitte & Touche Lip** 118917374 Dallas, TX
- ☐ **Deloitte & Touche Lip** 152155065 Las Vegas, NV
- ☐ **Deloitte & Touche Lip** 021649991 Phoenix, AZ
- ☐ **Deloitte & Touche Lip** 071460356 Philadelphia, PA
- ☐ **Deloitte & Touche Lip** 019121982 Reston, VA
- ☐ **Deloitte & Touche L.L.P.** 108351375 Stamford, CT
- ☐ **Deloitte & Touche Lip** 029430055 Fort Worth, TX
- ☐ **Deloitte & Touche Lip** 078521954 Stamford, CT
- ☐ **Deloitte & Touche Lip** 009319117 Midland, MI
- ☒ **Deloitte & Touche** 365571459 Lagos, Lagos, Nigeria
- ☐ **Deloitte & Touche L.L.P.** 090577409 Boston, MA
- ☐ **Deloitte & Touche Lip** 127226835 Honolulu, HI
- ☐ **Deloitte & Touche Lip** 826525839 Tallahassee, FL
- ☒ **Deloitte & Touche Products Company LLC** 116908986 Hermitage, TN
- ☐ **Deloitte & Touche Lip** 001719566 Detroit, MI
- ☐ **Deloitte & Touche Lip** 019951805 Boise, ID
- ☐ **Deloitte & Touche Lip** 080826944 Tampa, FL
- ☐ **Deloitte & Touche Lip** 079722478 Jericho, NY
- ☐ **Deloitte & Touche Lip** 079722462 Jersey City, NJ
- ☐ **Deloitte & Touche Lip** 087290714 Baltimore, MD
- ☐ **Deloitte & Touche Lip** 059475306 Williamsville, NY
- ☐ **Deloitte & Touche Lip** 838039899 Houston, TX
- ☐ **Deloitte & Touche Lip** 122712214 New York, NY
- ☐ **Deloitte & Touche Lip** 826526126 Camp Hill, PA
- ☒ **Jediko Inc.** 117014523 South San Francisco, CA
 - ☐ **Jediko Inc.** 117015866 Hoboken, NJ
- ☒ **Deloitte & Touche** 860237775
- ☐ **Deloitte & Touche Lip** 826525904 Morristown, NJ
- ☐ **Deloitte & Touche Lip** 122911782 Milwaukee, WI
- ☐ **Deloitte & Touche Lip** 020205894 San Diego, CA
- ☒ **Root9b, LLC** 004228716 Colorado Springs, CO
- ☐ **Deloitte & Touche Lip** 044019847 Atlanta, GA

- ☐ B Deloitte & Touche Llp 082371097 Minneapolis, MN
- ☐ B Deloitte & Touche Llp 091065193 San Juan, PR
- ☐ B Deloitte & Touche Llp 072252653 Miami, FL
- ☐ S Makros Spa 952904306 Santiago, Santiago, Chile
- ☐ B Deloitte & Touche Llp 064071590 Denver, CO
- ☐ B Deloitte & Touche Llp 117148814 Princeton, NJ
- ☐ B Deloitte & Touche Llp 096402417 Omaha, NE
- ☐ S Deloitte And Touche L L P 659518336 Kathmandu, Kathmandu, Nepal
- ☐ B Deloitte & Touche Llp 079566351 Hermitage, TN
- ☐ B Deloitte & Touche Llp 124098176 Gilbert, AZ
- ☐ B Deloitte & Touche Llp 089501670 Salt Lake City, UT
- ☐ B Deloitte & Touche Llp 035421934 Santa Fe, NM
- ☐ B Deloitte & Touche Llp 071230080 Charlotte, NC
- ☐ B Deloitte & Touche Llp 079722483 Rochester, NY
- ☐ B Deloitte & Touche Llp 075450262 Birmingham, AL
- ☐ B Deloitte & Touche Llp 826525078 Tulsa, OK
- ☐ B Deloitte & Touche Llp 826525433 Greenville, SC
- ☐ S Giant Machines Software Llc 079726222 New York, NY
- ☒ S Deloitte Touche Tohmatsu Services, Llc 079855810 New York, NY
- ☐ B Deloitte Touche Tohmatsu Services, Llc 081469589 Princeton, NJ
- ☒ S Deloitte South Africa 538932062 Johannesburg, Gauteng, South Africa
- ☐ S Deloitte Tipoffs Anonymous (pty) Ltd 538715330 Gauteng, Gauteng, South Africa
- ☐ B Deloitte Touche Tohmatsu Services, Llc 081469547 Tampa, FL
- ☐ B Deloitte Touche Tohmatsu Services, Llc 081469576 New York, NY
- ☐ B Deloitte & Touche Llp 144938961 Chicago, IL
- ☐ B Deloitte & Touche Llp 071324727 Louisville, KY
- ☐ B Deloitte & Touche Llp 080266414 Austin, TX
- ☐ B Deloitte & Touche Llp 187107958 Arlington, VA
- ☐ B Deloitte & Touche L.l.p. 123571036 Lansing, MI
- ☐ B Deloitte & Touche Llp 046575353 Chicago, IL
- ☐ B Deloitte & Touche Llp 826524832 New York, NY
- ☐ B Deloitte & Touche Llp 079722453 Washington, DC
- ☐ B Deloitte & Touche Llp 132558263 Des Moines, IA
- ☒ S Deloitte Restructuring Inc. 244117669 Toronto, Ontario, Canada

- **B Restructuration Deloitte Inc.** 258067453 Roberval, Quebec, Canada
- **B Deloitte Restructuring Inc.** 241881486 Sarnia, Ontario, Canada
- **B Deloitte Restructuring Inc.** 203486209 Corner Brook, Newfoundland And Labrador, Canada
- **B Deloitte Restructuring Inc.** 250102480 London, Ontario, Canada
- **B Restructuration Deloitte Inc.** 258150705 Dolbeau-mistassini, Quebec, Canada
- **B Restructuration Deloitte Inc.** 205819506 Trois-rivières, Quebec, Canada
- **B Deloitte Restructuring Inc.** 249774741 Guelph, Ontario, Canada
- **B Restructuration Deloitte Inc.** 247303076 Sept-îles, Quebec, Canada
- **B Restructuration Deloitte Inc.** 200151588 Bécancour, Quebec, Canada
- **B Restructuration Deloitte Inc.** 245926696 Québec, Quebec, Canada
- **B Restructuration Deloitte Inc.** 205717338 Trois-pistoles, Quebec, Canada
- **B Restructuration Deloitte Inc.** 202653473 Rouyn-noranda, Quebec, Canada
- **B Deloitte Restructuring Inc.** 243735727 Vancouver, British Columbia, Canada
- **B Deloitte Restructuring Inc.** 248508991 Toronto, Ontario, Canada
- **B Restructuration Deloitte Inc.** 201088536 Laval, Quebec, Canada
- **B Restructuration Deloitte Inc.** 204310890 Matane, Quebec, Canada
- **B Deloitte Restructuring Inc.** 246375914 Markham, Ontario, Canada
- **B Restructuration Deloitte Inc.** 200077696 Brossard, Quebec, Canada
- **B Restructuration Deloitte Inc.** 202653390 Jonquière, Quebec, Canada
- **B Deloitte Restructuring Inc.** 209880699 St. John's, Newfoundland And Labrador, Canada
- **B Restructuration Deloitte Inc.** 203205625 Rimouski, Quebec, Canada
- **B Restructuration Deloitte Inc.** 202653432 Normandin, Quebec, Canada
- **B Restructuration Deloitte Inc.** 202906343 Montreal, Quebec, Canada
- **B Restructuration Deloitte Inc.** 258726447 Grand-mere, Quebec, Canada
- **B Deloitte Restructuring Inc.** 203226410 Winnipeg, Manitoba, Canada
- **B Deloitte Restructuring Inc.** 259903529 Woodstock, Ontario, Canada
- **B Restructuration Deloitte Inc.** 257481911 Farnham, Quebec, Canada
- **B Deloitte Restructuring Inc.** 240331558 Burnaby, British Columbia, Canada
- **B Restructuration Deloitte Inc.** 258104918 Saint-félicien, Quebec, Canada
- **B Restructuration Deloitte Inc.** 205187359 Val-d'or, Quebec, Canada
- **B Restructuration Deloitte Inc.** 246612225 La Sarre, Quebec, Canada
- **B Restructuration Deloitte Inc.** 245019690 Amos, Quebec, Canada
- **B Restructuration Deloitte Inc.** 248521804 Gatineau, Quebec, Canada
- **B Restructuration Deloitte Inc.** 258150697 Alma, Quebec, Canada

- **B Restructuration Deloitte Inc.** 254099476 Granby, Quebec, Canada
- **B Restructuration Deloitte Inc.** 254703572 Chicoutimi, Quebec, Canada
- **B Deloitte Restructuring Inc.** 240793138 Langley, British Columbia, Canada
- **B Deloitte & Touche Llp** 095665527 Nashville, TN
- **B Deloitte Llp** 602986478 Las Vegas, NV
- **B Deloitte Llp** 098955386 Pittsburgh, PA
- **S Deloitte Financial Advisory Services Llp** 603795159 New York, NY
- **S Deloitte Transactions And Business Analytics Llp** 079287534 Jersey City, NJ
 - **B Deloitte Transactions And Business Analytics Llp** 117747739 Atlanta, GA
 - **B Deloitte Transactions And Business Analytics Llp** 117527782 Philadelphia, PA
 - **B Deloitte Transactions And Business Analytics Llp** 080820650 Boston, MA
 - **B Deloitte Transactions And Business Analytics Llp** 081251207 Morristown, NJ
 - **B Deloitte Transactions And Business Analytics Llp** 116839256 Dallas, TX
 - **B Deloitte Transactions And Business Analytics Llp** 079303018 Mclean, VA
- **B Deloitte Financial Advisory Services Llp** 966427515 Hermitage, TN
- **B Deloitte Financial Advisory Services Llp** 056873491 Mc Lean, VA
- **B Deloitte Financial Advisory Services Llp** 828881289 Arlington, VA
- **S Deloitte Corporate Finance Llc** 078866137 New York, NY
- **S Deloitte Corporate Finance Llc** 079608603 Chicago, IL
- **B Deloitte Financial Advisory Services Llp** 606893902 Washington, DC
- **B Deloitte Financial Advisory Services Llp** 828881487 Mclean, VA
- **B Deloitte Financial Advisory Services Llp** 080576491 Arlington, VA
- **B Deloitte Financial Advisory Services Llp** 117006068 Atlanta, GA
- **B Deloitte Llp** 050203100 Los Angeles, CA
- **B Deloitte Llp** 047479322 Summit, NJ
- **B Deloitte Llp** 058672880 Milton, MA
- **B Deloitte Llp** 080059779 Seattle, WA
- **B Deloitte Llp** 013970972 Jacksonville, FL
- **B Deloitte Llp** 031510979 Lake Mary, FL
- **S Deloitte Inc.** 853748528 Panama City, Panama, Panama
- **S Deloitte Consulting Llc** 055526624 The Woodlands, TX
- **B Deloitte Llp** 097712927 Lake Mary, FL
- **B Deloitte Llp** 048051381 Friendswood, TX
- **S Ubermind, Inc.** 015709293 Seattle, WA

- S Deloitte Professional Services (dlfc) Limited** 851217783 Dubai, Dubai, United Arab Emirates
 - HQ Deloitte & Touche - M E** 851034205 Abu Dhabi, Abu Dhabi, United Arab Emirates
 - S Deloitte Touche Tohmatsu** 487325615 Zürich, Zürich, Switzerland
 - B Deloitte Touche Tohmatsu** 480028811 Basel, Basel-stadt, Switzerland
 - B Deloitte Touche Tohmatsu** 480028805 Zürich, Zürich, Switzerland
 - B Deloitte Touche Tohmatsu** 480028822 Genève, Genf, Switzerland
 - B Deloitte Touche Tohmatsu** 480028827 Lausanne, Waadt, Switzerland
 - B Deloitte Touche Tohmatsu** 480028829 Lugano, Tessin, Switzerland
 - B Deloitte Touche Tohmatsu** 480028818 Bern, Bern, Switzerland
 - B Deloitte Touche Tohmatsu Limited** 220019573
 - S Deloitte Services Limited Partnership** 829593594 Stamford, CT
 - S Deloitte Llp** 243336567 Toronto, Ontario, Canada
 - B Deloitte Llp** 200472152 Prince Albert, Saskatchewan, Canada
 - B Deloitte Llp** 203205633 Montréal-nord, Quebec, Canada
 - B Deloitte Llp** 241679591 Vancouver, British Columbia, Canada
 - B Deloitte S.e.n.c.r.l./s.r.l.** 204234004 Laval, Quebec, Canada
 - B Deloitte Llp** 248442915 Guelph, Ontario, Canada
 - B Deloitte Llp** 241881325 Halifax, Nova Scotia, Canada
 - B Deloitte Llp** 204299598 St. John's, Newfoundland And Labrador, Canada
 - B Deloitte S.e.n.c.r.l./s.r.l.** 253354765 La Sarre, Quebec, Canada
 - B Deloitte S.e.n.c.r.l./s.r.l.** 204234033 Quebec, Quebec, Canada
 - B Deloitte Llp** 240743112 Prince George, British Columbia, Canada
 - B Deloitte Llp** 256216557 Montréal, Quebec, Canada
 - B Deloitte Llp** 204299556 Fredericton, New Brunswick, Canada
 - S Deloitte Management Services Lp** 246770437 Toronto, Ontario, Canada
 - B Deloitte Llp** 202731758 Concord, Ontario, Canada
 - B Deloitte Llp** 202731766 Windsor, Ontario, Canada
 - B Deloitte S.e.n.c.r.l./s.r.l.** 243317978 Montréal, Quebec, Canada
 - B Deloitte Llp** 244469805 Langley, British Columbia, Canada
 - B Deloitte S.e.n.c.r.l./s.r.l.** 204233998 La Sarre, Quebec, Canada
 - B Deloitte Llp** 253014062 Hawkesbury, Ontario, Canada
 - B Deloitte Llp** 244785122 Niagara On The Lake, Ontario, Canada
 - B Deloitte Llp** 207788659 Kitchener, Ontario, Canada
 - B Deloitte Llp** 253596324 Edmonton, Alberta, Canada
 - B Deloitte Llp** 200054810 Saint John, New Brunswick, Canada

- **B Deloitte Llp** 204302306 Moncton, New Brunswick, Canada
- **B Deloitte Llp** 208945956 Ottawa, Ontario, Canada
- **B Deloitte S.e.n.c.r.l./s.r.l.** 205717395 Matane, Quebec, Canada
- **B Deloitte Llp** 253014021 Burlington, Ontario, Canada
- **B Deloitte Llp** 243179657 Kanata, Ontario, Canada
- **B Deloitte Llp** 248747503 North York, Ontario, Canada
- **B Deloitte S.e.n.c.r.l./s.r.l.** 242417517 Drummondville, Quebec, Canada
- **B Deloitte Llp** 207894296 Ottawa, Ontario, Canada
- **B Deloitte Llp** 204299577 Vancouver, British Columbia, Canada
- **B Deloitte Llp** 245654095 Toronto, Ontario, Canada
- **B Deloitte Llp** 202731741 Fredericton, New Brunswick, Canada
- **B Deloitte Llp** 208140033 Mississauga, Ontario, Canada
- **B Deloitte Llp** 204299569 Victoria, British Columbia, Canada
- **B Deloitte Llp** 240003025 Toronto, Ontario, Canada
- **HQ Deloitte Advisory Lp, Agencia En Chile** 953284207 Santiago, Santiago, Chile
- **B Deloitte Llp** 204299580 Burlington, Ontario, Canada
- **B Deloitte Llp** 201134932 St Catharines, Ontario, Canada
- **B Deloitte S.e.n.c.r.l./s.r.l.** 241679430 Saint-hyacinthe, Quebec, Canada
- **B Deloitte Llp** 208767769 Toronto, Ontario, Canada
- **B Deloitte Llp** 250102456 St Catharines, Ontario, Canada
- **B Deloitte S.e.n.c.r.l./s.r.l.** 204233985 Brossard, Quebec, Canada
- **B Deloitte Llp** 241720184 Saskatoon, Saskatchewan, Canada
- **B Deloitte Llp** 203420562 Regina, Saskatchewan, Canada
- **B Deloitte S.e.n.c.r.l./s.r.l.** 204233993 Jonquière, Quebec, Canada
- **B Deloitte Llp** 244184649 Chicoutimi, Quebec, Canada
- **B Deloitte Llp** 245257246 Victoria, British Columbia, Canada
- **B Deloitte Llp** 203411967 Calgary, Alberta, Canada
- **HQ Axis Bank Limited** 561425037 Dubai, Dubai, United Arab Emirates
- **B Deloitte Touche Tohmatsu Limited** 218128992
- **B Deloitte Touche Tohmatsu Limited** 225546517
- **HQ Deloitte & Touche (m.e)** 552653032 Dubai, Dubai, United Arab Emirates
- **HQ Deloitte & Touche (m.e)** 851186860 Sharjah, Sharjah, United Arab Emirates

2.2.3 Certification of Financial Information

5.2.1.3 Firm Financial Qualifications

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These financial statements must be accompanied by a signed statement from the Bidder's or its Parent Company's Chief Executive Officer, Chief Financial Officer and/or Designee(s), certifying the financial information is accurate and complete. Alternatively, financial statements that include a signed statement by the independent certified public accountant, made a part of the financial statement, will suffice for the certification letter.

The above 2.2.1 confidential financial information was prepared for internal purposes from the books and records of Deloitte LLP. This financial information has not been audited and does not present the financial position, results of operations, or other financial information in accordance with generally accepted accounting principles.

This information is being provided to the State of California solely in connection with its RFP No. 01-2024, BenefitsCal Maintenance and Operations Services, and may not be utilized by or relied upon by any other third party for any purpose.

Sincerely,



2.3 Subcontractor Additional Details

6.3.3.4.3 Subcontractor Additional Details

The Contractor shall provide a detailed description of all Work to be performed by the Subcontractor(s) providing at least 20% of the annual price during the base contract period, including:

- Any Tasks, or portions thereof, that will be subcontracted must be identified and defined;
- Each Subcontractor(s) responsible shall be identified by name;
- The rationale for selection of the Subcontractor(s) must be stated; and
- The exact type and amount of Work to be done by each Subcontractor must be identified and defined.

Additionally, the Contractor shall delineate the percentage of the total BenefitsCal Services Work each Subcontractor will perform by SFY. The percentage of Work shall be calculated using the Subcontractor's portion of the total number of Work hours or by using another method such as the Subcontractor's portion of the prime Contractor's total price. The Contractor shall separately delineate the percentage of the total BenefitsCal Services Work any Minority or MWBEs or Disabled Veteran Owned Business Enterprises will perform by SFY.

During the base contract period, we will not have subcontractors. As such, we have not provided the subcontractor details requested.