



Deloitte Consulting LLP  
Suite 1800  
980 9th Street  
Sacramento, CA 95814  
USA

July 30, 2024

BenefitsCal M&O Services RFP #01-2024  
Attention: Tom Hartman  
11290 Pyrites Way  
Suites 150 and 175  
Rancho Cordova, CA 95670

Tel: +1 (916) 288-3100  
Fax: +1 (866) 719-2934  
[www.deloitte.com](http://www.deloitte.com)

**RE: RFP #01-2024, BenefitsCal Maintenance and Operations Services**

Dear Mr. Hartman:

Over the past five years, the Consortium has significantly evolved in its support for Customers and Counties, a testament to its dedication to serving Californians most vulnerable. As your partner in this journey, we are committed to continuing our support, helping to further enhance the lives of those you serve. Now, all counties use a unified system—CalSAWS—to determine eligibility, providing a robust technical foundation alongside BenefitsCal.

Technology is advancing quickly, and we are ready to help the Consortium enhance and use the BenefitsCal and CalSAWS platforms to work together more effectively. This enables more streamlined, impactful support for Californians in need.

Deloitte\* is pleased to submit our proposal to provide BenefitsCal Maintenance and Operations Services to the California Statewide Automated Welfare System (CalSAWS) Consortium. Per the requirements of your RFP, we have provided the information requested in the remainder of this transmittal letter.

Yours sincerely,

A handwritten signature in blue ink that reads "Rachel Frey". The signature is fluid and cursive, with a long, sweeping tail that loops back under the name.

**Rachel Frey**  
Principal, Deloitte Consulting LLP

---

\* As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

## RFP Response Requirements

### 6.3.3.1 Transmittal Letter

The Proposal shall contain a transmittal letter to the Consortium. The Transmittal Letter shall include the following:

1. The Contractor's business name and address;
2. The nature of the Contractor's business organization, such as: corporation, partnership or other entity;
3. The Contractor's Primary Business Contact including name, title, phone number and email address;
4. A statement certifying that neither the organization, proposed Subcontractor organizations, nor any of their principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal, State or County department or agency;
5. A reference to all RFP Addenda received by the Contractor; if none have been received, a statement to that effect must be included;
6. A statement indicating whether the Contractor has had any contracts terminated within the last five (5) years. If any such terminations exist, the Contractor must include details regarding the contract, the reason for termination, date of termination, and client contact information;
7. A statement indicating whether the Contractor is or has been involved in litigation regarding any contracts to which the Contractor is a party, within the previous five (5) years. If any such litigation exists, the Contractor must include details regarding the contract, the reason for litigation, date of litigation, and client contact information;
8. A description of any Prime or Subcontractor formal relationships with the Consortium or Counties over the last twenty-four (24) months;
9. A description and associated contract number(s) of any existing contracts between the Contractor's organization, or any party named in the Contractor's response to this RFP, with the Consortium or any California County(ies). If no such contracts exist, so declare;
10. A description of how the Contractor will address any potential conflicts between the Work underway on current contracts and the BenefitsCal and/or BenefitsCal Services;
  - A statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period, which must be at least twelve (12) months from the Proposal due date specified in Section 1 or through the Agreement start date, whichever is later;
  - A description of Contractor's corporate commitment to diversity, equity, and inclusion in hiring and contracting, including a description of Contractor's efforts to enter into subcontracts on the Project with qualified Minority and Women Business Enterprises (MWBs) and/or Disabled Veteran Business Enterprises (DVBs); and
  - The letter shall be signed by an officer or agent of the Contractor's organization who is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. The Contractor shall include the job title of the individual who signs the letter.

The Transmittal Letter must not contain price information

Our response to each of these requirements is below:

---

**Requirement**

The Contractor's business name and address

Deloitte Consulting LLP  
980 9th Street, Suite 1800  
Sacramento, CA 95814

Deloitte's headquarters is located at 30 Rockefeller Plaza, New York, NY 10112.

---

**Requirement**

The nature of the Contractor's business organization, such as: corporation, partnership or other entity;

Deloitte Consulting LLP is a Limited Liability Partnership.

---

**Requirement**

The Contractor's Primary Business Contact including name, title, phone number and email address;

Rachel Frey  
Principal  
[REDACTED]  
rfrey@deloitte.com

---

**Requirement**

A statement certifying that neither the organization, proposed Subcontractor organizations, nor any of their principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal, State or County department or agency;

Neither Deloitte Consulting LLP, our proposed subcontractors, nor any of our principals are presently debarred, suspended, proposed for debarment, declared ineligible, or are voluntarily excluded from participation in this transaction by any Federal, State or County department or agency.

---

**Requirement**

A reference to all RFP Addenda received by the Contractor; if none have been received, a statement to that effect must be included;

Deloitte Consulting LLP acknowledges receipt of the following RFP amendments:

- Amendment 1, posted June 17, 2024
- Amendment 2, posted June 25, 2024
- Amendment 3, posted July 3, 2024

---

**Requirement**

A statement indicating whether the Contractor has had any contracts terminated within the last five (5) years. If any such terminations exist, the Contractor must include details regarding the contract, the reason for termination, date of termination, and client contact information;

Deloitte Consulting LLP has had no terminations for default for performance in our California state and local practice over the past five (5) years.

**Requirement**

A statement indicating whether the Contractor is or has been involved in litigation regarding any contracts to which the Contractor is a party, within the previous five (5) years. If any such litigation exists, the Contractor must include details regarding the contract, the reason for litigation, date of litigation, and client contact information;

Deloitte Consulting LLP, as a leading provider of consulting services, is routinely involved in complex consulting projects, often involving large-scale systems implementations and multiple service providers. We are justifiably proud of our record of client satisfaction; however, projects do occasionally give rise to disagreements over contract requirements, and we are occasionally, though rarely, involved in litigation pertaining to our consulting services. Such matters will not affect our ability to provide consulting services, nor will they affect our ability to serve the Consortium in connection with this proposed engagement or to continue serving the State of California as we have continually for over 50 years.

**Requirement**

A description of any Prime or Subcontractor formal relationships with the Consortium or Counties over the last twenty-four (24) months;

A description and associated contract number(s) of any existing contracts between the Contractor's organization, or any party named in the Contractor's response to this RFP, with the Consortium or any California County(ies). If no such contracts exist, so declare;

Deloitte's formal Consortium and County relationship details for the past 24 months are included in Table 1-1 below.

Contract Number	Title	Contract Period	Project Description
<b>CalSAWS Consortium</b>			
<b>2002954.1 14448-005</b>	CalSAWS CalWIN Implementation Services (ISS)	12/09/2020 – 5/31/2024	Implementation Support Services for the CalWIN Counties transition to the CalSAWS system
<b>1958624.1</b>	CalSAWS Portal/Mobile App (BenefitsCal)	08/01/2020 – 12/31/2024	Develop the Statewide Portal/Mobile Application for CalSAWS
<b>City &amp; County of San Francisco</b>			
<b>1000013297</b>	CCSF Comprehensive Annual Financial Report (CAFR), Phase II	01/25/2019 – 01/24/2022	Assistance in preparation Comprehensive Annual Financial Report (CAFR)
<b>1000014040</b>	CCSF CAFR	06/06/2019 – 06/05/2023	Implementation of financial system and accounting requirements services
<b>1000014039</b>	CCSF EPIC Project	06/10/2019 – 06/09/2023	Implementation of new systems services

Contract Number	Title	Contract Period	Project Description
1000017994	CCSF GASB 84 & 87	06/01/2020 – 06/30/2025	Implementation of financial system and accounting requirements services
1000018438	CCSF MBU & FSP Func Adopt & Enh	07/01/2020 – 06/30/2025	Implementation of financial system and accounting requirements services
1000023976	CCSF PORT GASB 87 Lease Abstraction	01/10/2022 – 08/01/2023	Professional services regarding implementation of Government Accounting Standards Board statement number 87
PO-23328	CCSF Project Marlin_21 Tech PO 23328 0000538230	07/19/2021 – 09/15/2022	Provide Professional Services for 311 Integration Platform Modification Project. Subcontract - 21TECH LLC (Prime) with BIAS/Deloitte to provide services (subcontract is with BIAS, which Deloitte acquired in March 2022)
PO-23346	CCSF Project Marlin_21 Tech PO 23346 0000551311	09/03/2021 – 09/15/2022	Professional Services: Transitional Operations Services. Subcontract - 21TECH LLC (Prime) with BIAS/Deloitte to provide services (subcontract is with BIAS, which Deloitte acquired in March 2022)
1000014974	CCSF Technical Accounting	07/15/2019 – 12/31/2021	Provide CAFR technical accounting resources
1000024365	CCSF UASI Digital Assessment	1/10/2022 – 06/30/2202	Research, plan and design/recommend an integrated, digital solution
1000012304	City and County of San Francisco CAFR Accounting Support Services	10/01/2018 – 09/30/2023	Provide consulting services in accounting reconciliations (previous description: Assistance in preparation CAFR)
1000024730	City and County of San Francisco LC- Implement & Lease Srv	06/13/2022 – 06/30/2025	Software implementation tracking Lessee & Lessor agreements assist in meeting requirements for GASB 87
No Agrmt #	CCSF Applicant Tracking System	08/12/2020 – 08/11/2021	Provide resources for Applicant Tracking System; subcontractor to SmartRecruiters
1000021349	COVID19 Inventory Controls & Accounting	06/28/2021 – 06/27/2022	Provide COVID-19 supplies inventory control and accounting services



County of San Diego			
571480	Enterprise-wide Assessment of Homeless Services in the County of San Diego	05/06/2024 – 09/10/2024	An enterprise-wide assessment on County homelessness programs and services dedicated to serving the unsheltered population.
PO-0037738	County of SD Essbase Support TM	03/28/2022 – 03/27/2023	Provide remote functional, integration, testing, end-to-end processing, and reporting management services for an Oracle Essbase Application by supplying technical resources on a Time and Materials basis; Subcontract Deloitte (Sub) and Perspecta (Prime)
PO-0023293	County of SD Oracle & CAFR Support TM	09/11/2020 – 03/31/2022	Provide technical resources (on demand) to provide/in support of Oracle EBS Application Technical & CAFR Support project. Subcontract BIAS Corp (sub) SOW w/ Perspecta (Prime); Deloitte acquired BIAS in March 2022
County of San Mateo			
R079912	Cybersecurity	09/12/2023 – 09/11/2028	Deloitte to provide Cybersecurity services for San Mateo County.
County of Sacramento			
No Agrmt #	Sac County Fed Grants	05/03/2021 – 12/31/2022	Provide expert assistance in planning, tracking, and reporting the use of Federal American Rescue Plan funds
County of Los Angeles			
AO-19-061	Hiring Innovation Services	04/21/2019 – 04/15/2021	Provide hiring innovation consulting services
PS66571-2005	Fareless System Initiative (FSI) Life Consulting Services	08/18/2022 – 02/17/2023	Provide professional services related to the Fareless System Initiative, including strategic roadmap, data analysis, and communication
County of Los Angeles – Bench Contracts			
PS66571-2005	Regional Rail Strategic Financial Advisory On-Call Services, Discipline 2, Advisory/Advocacy Services	12/07/2020 – 12/06/2025	Strategic advisory support services to build support among stakeholders and decision-makers relative to the project(s)

County of San Diego			
<b>PS66571-2000</b>	Regional Rail Strategic Financial Advisory On-Call Services, Discipline 1, Financial Advisory Services	12/07/2020 – 12/06/2025	Financial advisory support services: development of an attainable funding and implementation plan, feasibility analysis for potential commercial development opportunities
<b>PS61431001</b>	Public Private Partnership Advisory Services	10/28/2019 – 10/28/2024	Provide financial advisory services regarding financial analysis support to identify, assess, develop, and implement innovative projects and delivery models
<b>PS77647018</b>	IT Services Bench Contract [Deloitte Subcontractor to EK Associates]	04/18/2022 – 03/31/2027	IT services relating to LA County Metro Transit Authority Transit System to be determined by Task Order. Deloitte to perform services under subcontract with EK Associates
<b>No Agrmt #</b>	Enterprise Services Master Agreement	02/10/2021 – 02/09/2023	On-Call IT Services: Enterprise Information Technology
<b>ITS-I10527-CA13: H35A7: H35A2: H35H4A20: H35A1: H35</b>	Installation and Operation of Community Broadband Networks to Deliver Residential Services	11/09/2022 – 11/09/2027	Telecommunications services to be assigned through individual work orders

**Table 1-1. Deloitte's County Relationship Details.**

Requirement
A description of how the Contractor will address any potential conflicts between the Work underway on current contracts and the BenefitsCal and/or BenefitsCal Services;
We do not foresee an overlap in scope with other Consortium or County contracts. If the potential of a conflict is identified by either the Contractor or the Consortium, we will work with the Consortium immediately to mutually resolve the conflict. If the Contractor or the Consortium cannot resolve the conflict, both parties will follow the Agreement – Dispute Between Contractor and Consortium process.
Requirement
A statement certifying that the Contractor's Proposal as submitted will remain in full force and effect for a specified period, which must be at least twelve (12) months from the Proposal due date specified in Section 1 or through the Agreement start date, whichever is later;
This proposal will remain in full force and effect for twelve (12) months from the scheduled date to submit the proposal or through the end of contract negotiations, whichever is later.
Requirement
A description of Contractor's corporate commitment to diversity, equity, and inclusion in hiring and contracting, including a description of Contractor's efforts to enter into subcontracts on

---

Requirement

the Project with qualified Minority and Women Business Enterprises (MWBEs) and/or Disabled Veteran Business Enterprises (DVBEs); and

---

## Contracting Diversity

Diversity in our talent and our business relationships brings richness and strength to the business solutions that we provide. Our commitment to diversity extends to our supply chain, where we drive toward broadening our supplier base of minority, small, women-owned, and other diverse suppliers to provide best-in-class technology and innovative solutions to our clients.

To enable its mission of reaching \$1B in annual spend with diverse suppliers by 2025 (including \$200M in spend with Black-owned enterprises), Deloitte's Office of Business Diversity leads the charge by effectively building and leveraging relationships with diverse suppliers across the Deloitte U.S. firm. Deloitte creates business opportunities for diverse suppliers by not only inviting them to participate in appropriate contracting opportunities, but by delivering strategic programs that support suppliers' skills and capabilities development through mentor-protégé relationships and strategic market growth.

Deloitte seeks diverse suppliers of numerous types, as designated by federal, state, and local governments as well as industry organizations, including but not limited to:

- SBE: Small Business Enterprise
- DBE: Disadvantaged Business Enterprise
- SDBE: Small Disadvantaged Business Enterprise
- MBE: Minority Business Enterprise
- WBE: Women Business Enterprise
- MWBE: Minority & Woman Business Enterprise
- VOB: Veteran-Owned Business
- SDVBE: Service-Disabled Veteran Business Enterprise
- DVBE: Disabled Veteran Business Enterprise
- HUB: Historically Underutilized Business
- GLBT: Gay, Lesbian, Bisexual or Transgender

Our Office of Business Diversity's mission and vision are as follows:

Create lasting wealth for historically underrepresented businesses owned by racially and ethnically diverse people, women, persons with disabilities, LGBT community members, veterans, and others (collectively referred to as "Diverse Suppliers"). Our vision is to develop an ecosystem of internal and external stakeholders that supports the identification, recruitment, development, use, and retention of Diverse Suppliers. We also seek to influence our Tier 1 suppliers to expand Tier 2 supply chain diversity. In support of our Responsible Procurement Policy, and to influence responsibility and sustainability in our supply chain, we include standard questions in supplier RFXs to evaluate each supplier's commitment to supporting supplier diversity. For more information on Deloitte's commitment to supplier diversity, please refer to the [Deloitte DEI Transparency Report](#)



## Hiring and Retention Diversity

Deloitte has been formally committed to diversity, equity, and inclusion (DEI) for over 25 years when we became the first professional services organization to establish women's and diversity initiatives. While much has changed over the years, a few things have remained constant: leadership commitment, continuous evolution, and an innovative approach. Today, we are focused on attracting, retaining, and advancing a diverse workforce and strengthening an inclusive culture where all our people can connect belong and grow.

Through collaborations and initiatives, we are expanding our talent pool by reaching talent early, preparing them for college and their careers, and building interest in our profession.

A few examples include:

- **RightStep:** Deloitte's strategy to address education needs across America, we are committing time, talent, and resources to help low-income students (predominately Black and Latinx) prepare for and persist through high school and college, then transition to a career. The RightStep Virtual Mentoring Program has grown to become the single largest year-round engagement opportunity at Deloitte. Since the program's inception in 2017, 2,662 Deloitte mentors have served 5,946 students—and participation has skyrocketed during the pandemic.
- **Braven Accelerator:** Deloitte professionals are working with Braven to support the Braven Accelerator as leadership coaches, providing promising college students with professional development skills and mentorship. The connections made through the initiative not only help first-generation college students navigate their college experiences, but also prepare them to move into their post-graduate careers with the support of Deloitte professionals.
- **Deloitte Foundation:** STEM Pathways provides data analytics/computer science curriculum to under-resourced/underrepresented high school students. In just two years we've reached over 1,000 high school students from vulnerable communities across the country.
- **Girls Who Code Alumni Program:** Deloitte sponsors the alumni program including College Loops, university-level networks for college-aged women interested in tech designed to support one another and help each other persist and succeed in the field.

We engage in a number of activities to recruit people from a wide range of backgrounds, including offering scholarships, internships and pre-hire development opportunities. Here are a few examples:

- **Strategic sourcing relationships:** We invest annually in approximately 30 strategic sourcing relationships and alliances that assist in identifying top talent. These relationships and alliances span both our student and experienced hire recruiting efforts and include, but are not limited to: Ascend, National Association of Black Accountants, Association of Latino Professionals For America, Out & Equal, Historically

Black Colleges and Universities, Management Leaders for Tomorrow, The Posse Foundation, AfroTech, Grace Hopper, and Lesbians Who Tech. We continue to explore additional programs and organizations working to create alternate pathways to employment in our communities.

- **Nontraditional recruiting:** We are also committed to augmenting the diversity of our professional talent pool by hiring and upskilling candidates from nontraditional recruitment channels. Deloitte continues to invest in hire-to-train and train-to-hire programs such as Encore, Junior Military Officer recruiting, Autism@Work, and Pathfinder.
- **HBCU Emerging Leaders in Accounting:** A multi-day program that brings together select students from HBCUs across the country for the possibility of being awarded a \$10,000 scholarship. In addition to professional development programming, participants receive mentorship by Deloitte Audit & Assurance professionals and business leaders.
- **Deloitte Women's Leadership Launch (DWLL):** During the weekend-long interactive workshop, rising female MBA/Masters candidates have the opportunity to experience formal and informal mentorship, leadership panels, classroom workshop sessions, and networking activities.

DEI is integrated throughout our development culture and embedded into major milestone trainings—from onboarding to training at each career level. We invest heavily in professional growth as demonstrated by Deloitte University. We continually provide our people with a variety of learning and networking opportunities—including exposure to leaders, sponsors, coaches, and challenging assignments—to help them as they navigate their careers. Because we all have different strengths, we know that there isn't a one size fits all when it comes to development. So, we offer a number of leadership development programs to help propel career advancement. We see deployment as a key component of development. It's through a wide variety of assignments that our people gain experience, learn from others, and are exposed to various industries and skillsets. We closely monitor deployment processes so that our people have the opportunities they need to develop and grow.

We see an inclusive culture – where our people can be their authentic selves and know they belong here – as a key factor in retention. Inclusion is embedded into our daily experiences and allows our people to connect, belong, and grow. We bring it to life through:

- Inclusion councils across the country
- A focus on inclusive leadership behaviors
- Inclusion Summit
- Day of Understanding
- Empowered Well-being
- Paid Family Leave
- Mental Health @ Work

---

**Requirement**

The letter shall be signed by an officer or agent of the Contractor's organization who is authorized to negotiate on behalf of the Contractor and commit the organization to the terms and conditions of the Agreement resulting from this procurement. The Contractor shall include the job title of the individual who signs the letter.

---

Deloitte Consulting LLP is a limited liability partnership owned entirely by its partners and principals. As Principal, Rachel Frey is authorized to bind the bidding firm contractually and has electronically signed this Transmittal Letter. Rachel is authorized to negotiate on behalf of Deloitte Consulting LLP and commit the organization to the terms and conditions of the Agreement resulting from this procurement.