

11.11 ATTACHMENT 11 – KEY STAFF REFERENCE FORM

Instructions:

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

The Individual references must be submitted within the Business Proposal as defined within RFP Section 6 - Proposal Structure and Submission including signature of the customer/client reference.

References:

Provide two customer/client references from customers/clients who have first-hand knowledge of the job skills, experience, and abilities cited in the résumé.

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

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name:	
Part 1 – Reference's Information	
This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications.	
Customer/Client Reference Name:	Diane Alexander CalSAWS
Customer/Client Reference Title	CalWIN Executive Director
Agency, Department, Organization or Company where Staff member performed:	CalSAWS
Project Title on which Staff member performed	CalWIN
Reference Phone Number:	916-208-2304
Reference E-mail Address:	diane.alexander@comcast.net

Instruction for References: The Contractor Staff above has listed you as a reference and is requesting for you to complete this Staff Reference Form. Please provide your comments and the appropriate rating based on your experience with the proposed Staff.

- Step 1:** Complete Columns 1-2 in Part 2 by marking "yes" or "no" and providing an explanation if needed.
- Step 2:** Complete Part 3 and provide your performance ratings.
- Step 3:** At the bottom of the page, print your name, your company's name, then sign and date.
- Step 4:** Return the completed, signed Staff Reference Form to Contractor.

Part 2 – The Reference Must Complete This Table.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 10 – Key Staff Resumes /Qualifications for the Contractor's Staff named at the top of this page prior to your completion of this form?	Did the Contractor's Staff named at the top of this page perform the services described in Attachment 10 – Key Staff Resumes /Qualifications , including the functions as described and the time period provided on the project(s) that lists you as a contact?
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If "No" checked, explain here.)

Part 3 – The Reference Must Complete This Table.

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

Performance and Ability Statements

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

Satya's performance during this engagement was of high quality. His engagement with the Consortium teams was very interactive and responsive as well as with his Gainwell team members. His attention to detail was reflected in the quality of the work his teams performed.

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

Work was performed timely and accurately. During the almost six years as the CalWIN Executive Director there was a lot of activity especially during the pandemic that needed to be completed quickly. Satya and his team was fully engaged at all times. Satya was also very transparent when things did go off track and would bring a plan to get the project back on track when needed.

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

Satya has excellent verbal and written communication skills. As mentioned above there were many projects being implemented that crossed over multiple teams and required detailed communications. Satya insured this communication stayed on track.

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

Satya maintained positive working relationships with his coworkers as well as the consortium personnel as well. He was engaged all along the way and made sure the teams were on the same page and communicating as well.

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

Satya had a through understanding and expertise in his areas of responsibility which was primarily front end applications, backend operations, MyBenefits CalWIN, IVR and Analytics.

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

Satya participated in key end users committee meetings where user input was provided as well as our operations meetings with all 18 CalWIN counties and our Subcommittee

Part 3 – The Reference Must Complete This Table.

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

meetings with the County Directors. All of these forums provided opportunity for end user input.

7. Would you rehire this person?

Yes.

8. Optional Comments:

In my time as Executive Director, Satya's knowledge of his responsibilities, communication skills and his leadership skills were of a very high caliber and served our counties very well.

On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this individual's overall performance?

10.

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

Diane Alexander

Name of Reference (print)
(print)

Diane Alexander

Signature of Reference

CalSAWS/Retired

Name of Company Reference

7/20/2024

Date

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name:	
Part 1 – Reference's Information	
This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications.	
Customer/Client Reference Name:	Bob Nakano CalSAWS
Customer/Client Reference Title	Senior Business Systems Analyst
Agency, Department, Organization or Company where Staff member performed:	CalSAWS
Project Title on which Staff member performed	CalWIN
Reference Phone Number:	916-600-5891
Reference E-mail Address:	bob.h.nakano@gmail.com

Instruction for References: The Contractor Staff above has listed you as a reference and is requesting for you to complete this Staff Reference Form. Please provide your comments and the appropriate rating based on your experience with the proposed Staff.

Step 1: Complete Columns 1-2 in Part 2 by marking "yes" or "no" and providing an explanation if needed.

Step 2: Complete Part 3 and provide your performance ratings.

Step 3: At the bottom of the page, print your name, your company's name, then sign and date.

Step 4: Return the completed, signed Staff Reference Form to Contractor.

Part 2 – The Reference Must Complete This Table.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 10 – Key Staff Resumes /Qualifications for the Contractor's Staff named at the top of this page prior to your completion of this form?	Did the Contractor's Staff named at the top of this page perform the services described in Attachment 10 – Key Staff Resumes /Qualifications , including the functions as described and the time period provided on the project(s) that lists you as a contact?
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If "No" checked, explain here.)

Part 3 – The Reference Must Complete This Table.

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

Performance and Ability Statements

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

Manages and responsible for operations of service delivery teams for Web applications, Backend, MyBenefits CalWIN Portal, IVR and Analytics on CalWIN account to ensure that services are delivered in accordance with agreed upon business solution goals and objectives. Identifies and manages the implementation of process improvements. Delivery accountability with operational focus. Ensure all of the Towers are delivering effectively and in accordance with contractual obligations, SLAs, and client expectations. Monitor governance, reporting, corrective/improvement action plans.

* Ensure that the Teams are partnering where appropriate and that processes are in place such that the different parts coordinate efforts and can work effectively. Help new projects and involve all necessary accountable teams

* Engage with client leadership and provide representation for all Delivery initiatives and Operations.

* Work Demand prioritization and rationalization. Oversight for Resourcing Demand and Planning, including pyramid objectives

P&L/Cost Performance results; Forecast oversight. Represent the Account as needed in cross-account initiatives

* Lead and initiate where needed assessments of opportunities to bring innovation to the client. Partner with the CTO and Chief Architect to prioritize technology upgrades.

Satyanarayana (Satya) Gandhi's performance as a Gainwell Technologies Account Delivery Leader for the CalWIN Project has been exceptional. He developed a very strong relationship with the CalSAWS / CalWIN Project Leadership team and demonstrated a willingness to go above and beyond to ensure CalWIN success. Satya has very strong follow up skills and his ability to lead was demonstrated time and again with bringing solutions and options back to the Client, and then leading his team(s) to execute the agreed upon plan. There also were times where it appeared that the scope of Satya's responsibilities may have been stretched due to organizational or personnel changes and Satya seemed to handle those situations with ease. In addition to his technical acuity, one of Satya's strengths is his ability to listen to and interpret the Client's concerns and comfort level with proposed activities. This often led to and helped bring about more collaborative and agreeable solutions.

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

I was always impressed at how quickly Satya became familiar with the CalWIN applications and picked up upon their intricacies and as well as the interdependence with their Interfaces. This allowed Satya

Part 3 – The Reference Must Complete This Table.

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

to immediately contribute to the support of the CalWIN Enterprise. Much of my experience working with Satya was around issue resolution. Satya worked well with his team and the Client to isolate issues and bring timely resolution to them.

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

Satya's verbal and written communication skills are strong. He is very good at ensuring mutual understanding between parties and gaining agreement to plans and recommended actions. Satya has very good listening skills and does not hesitate to jump in to ensure messages are accurately conveyed and received.

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

As mentioned previously, Satya established a very good rapport with the CalSAWS / CalWIN Leadership team. His forthright approach instilled trust with the Project stakeholders and clearly seemed to extend to that of his team and other support organizations.

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

As mentioned, Satya impressed me immediately on how quickly he came up to speed and became knowledgeable of the CalWIN applications and their interoperability. He diligently learned the input and output requirements, their schedules/deadlines, and third-party impact. He was able to quickly apply that knowledge to managing the environments and leading his team(s) to resolve issues quickly.

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

I can't specifically recall instances of his direct engagement with end users; however, Satya clearly understood the input that the CalWIN applications received from the Users and how that input was ingested into the system. Of course, his team(s) would engage with the end users either through the CalWIN Solutions Support Center (help desk) or its ticketing system. Satya's knowledge of the end users

Part 3 – The Reference Must Complete This Table.

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

and User Input was invaluable in his leadership and the direction provided to his team(s) to resolve any issues or anomalies.

7. Would you rehire this person?

Yes. Satya has clearly demonstrated his leadership and commitment to the success of the Project. He would be an asset to any organization.

8. Optional Comments:

It was a pleasure working and collaborating with Satya Gandhi and supporting the CalWIN Project together.

On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this individual's overall performance?

9

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

Bob Nakano

Name of Reference (print)
(print)

CalSAWS / CalWIN (Retired)

Name of Company Reference

Bob Nakano
Signature of Reference

7/18/2024
Date

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name:	
Part 1 – Reference's Information	
This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications .	
Customer/Client Reference Name:	Leora Filosen
Customer/Client Reference Title	Deputy Director
Agency, Department, Organization or Company where Staff member performed:	California Department of Social Services
Project Title on which Staff member performed	CMIPS II
Reference Phone Number:	
Reference E-mail Address:	Leora.Filosena@dss.ca.gov

Instruction for References: The Contractor Staff above has listed you as a reference and is requesting for you to complete this Staff Reference Form. Please provide your comments and the appropriate rating based on your experience with the proposed Staff.

- Step 1:** Complete Columns 1-2 in Part 2 by marking "yes" or "no" and providing an explanation if needed.
- Step 2:** Complete Part 3 and provide your performance ratings.
- Step 3:** At the bottom of the page, print your name, your company's name, then sign and date.
- Step 4:** Return the completed, signed Staff Reference Form to Contractor.

Part 2 – The Reference Must Complete This Table.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 10 – Key Staff Resumes /Qualifications for the Contractor's Staff named at the top of this page prior to your completion of this form?	Did the Contractor's Staff named at the top of this page perform the services described in Attachment 10 – Key Staff Resumes /Qualifications , including the functions as described and the time period provided on the project(s) that lists you as a contact?
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If "No" checked, explain here.)

Part 3 – The Reference Must Complete This Table.

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

Performance and Ability Statements

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

Large, complex IT web-based system and public-facing portal with a high number of recipients, providers, and system end users involved in the California IHSS program. The CMIPS II is used by end users across the 58 California counties, the CDSS, DHCS, and CalHHS-OTSI CMIPS II Project Office. Ensure project scope is defined, agreed upon, and adhered to for the life of the project, unless intentionally modified and approved.

- * Make sure all types of project resources are assigned, available and producing project deliverables as planned.
- * Develop a detailed schedule of project tasks and deliverables, and track progress against the schedule.
- * Led the team of 50 across broad technical and business disciplines; tracked progress to ensure project milestones were completed on time, on budget, and desired results were achieved.
- * Monitor time reporting to ensure project staff are delivering services as planned.
- * Follow Project Close Down Processes (e.g. Lessons Learned, Project Archiving).
- * Reduced and controlled costs and increased overall efficiency by automating processes including batch monitoring, service request resolutions, and routine work; delineated between new work and regulated maintenance and operations by assigning specified resources for new work and maintenance work.
- * Increased efficiency through digitizing timecard submission by developing solution and architecture to use cloud and on-premise infrastructure using agile methodologies; created solution for responsive web design for application use on all devices.
- * Managed internal and external projects; supervised scrum teams working with project managers.

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

Very good. Most deadlines were met and product was delivered on time.

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

Very good. No issues.

Part 3 – The Reference Must Complete This Table.

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

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

Very good. It always seemed like the team worked well together/

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

Very good. Our system was very complicated. We could always turn to the contractor's team to provide subject matter expertise.

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

They always accepted feedback and did their best to make it work for us and get us what we needed.

7. Would you rehire this person?

Yes.

8. Optional Comments:

On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this individual's overall performance?

I would rate them a **9**.

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

<u>Leora Filosena</u>	<u>California Department of Social Services</u>
Name of Reference (print) (print)	Name of Company Reference

<u>Leora Filosena (electronically signed)</u>	<u>July 25, 2024</u>
Signature of Reference	Date