

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: Michael Alan Johnson	
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
Customer/Client Reference Title	Executive Director
Agency, Department, Organization or Company where Staff member performed:	CalSAWS Consortium / Welfare Client Data Systems (WCDS)
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.

Michael's performance during my tenure as the CalWIN Executive Director was exceptional. His approach to how he managed his team, collaboration with consortium staff, the CalWIN counties, and with other managers was always interactive, respectful and very professional.

Michael and his team were critical to the success of CalWIN's conversion to CalSAWS. It required significant collaboration with other vendors over a period of 3+ years to map data, batch processes, reference tables, etc., as well as managing the 6 waves of counties as they cutover to CalSAWS between October 2022 – October 2023. All the while applying lessons learned from each wave to improve the cutover for the next wave.

Michael and his team did an outstanding job.

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

Michael managed the work and his teams so that work was performed in a timely manner. That included regular CalWIN M&O efforts as well as CalSAWS Migration efforts.

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

One of Michael's strengths is his communication skills. Michael is capable of breaking things down for those that need the detail and keeping it at a higher level when needed. His written skills are excellent as demonstrated in the multitude of presentations needed for various meetings with our counties, the Project Steering Committee and Joint Powers Authority Committee.

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

Michael was very engaging with his staff as well as his coworkers. His coworkers included Gainwell staff, consortium staff from both CalWIN and CalSAWS, various vendors including Accenture and Deloitte for Benefits Cal and Implementation Services. All of which were very positive.

Part 3 – The Reference Must Complete This Table.

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

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

Michael had a through understanding and expertise in his areas of responsibility which was primarily portfolio management, providing oversight for all CalWIN/CalSAWS activities.

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

Michael was very engaging with our counties and would elicit user input through our operations meetings with the counties, Subcommittee meetings with our Directors, or other means such as using the "County Request for Information" process,

7. Would you rehire this person?

Yes.

8. Optional Comments:

Michael's performance during my tenure as CalWIN Executive Director was impeccable. Michael was responsible for several critical areas including the overall CalWIN conversion all of which let to a very successful migration to CalSAWS.

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

7/23/2024
Date

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name: Michael Alan Johnson	
Part 1 – Reference's Information	
This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications .	
Customer/Client Reference Name:	Josy Thomas
Customer/Client Reference Title	Project Sponsor
Agency, Department, Organization or Company where Staff member performed:	CalSAWS Consortium / Welfare Client Data Systems (WCDS)
Project Title on which Staff member performed	CalWIN
Reference Phone Number:	(916)230-3403
Reference E-mail Address:	thomasjg@calsaws.org

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.

Michael has consistently shown his commitment to customers by paying exceptional attention to detail in the projects he has worked on. He has the ability to effectively manage multiple responsibilities. As a program manager, he has demonstrated a willingness to go above and beyond to complete projects on time while maintaining high accuracy. During CalWIN engagement, his performance consistently met expectations in most essential areas of responsibilities of project management.

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

Michael has demonstrated a strong work ethic and a commitment to fulfilling contractual obligations to the Customer (CalWIN consortium and Counties) by consistently delivering high-quality work on time and exceeding expectations. His dedication to timely delivery of work was clearly evident during the CalWIN to CalSAWS conversion while serving as the Conversion Program Manager.

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

During the project management cycle, CalWIN maintained a robust communication protocol, and Michael has demonstrated strong verbal and written communication skills while fulfilling his project management duties. As a manager at the CalWIN project, Michael ensured that his team and customers received the necessary information on time to carry out project tasks. He showcased his verbal communication skills during numerous presentations to Consortium/County Directors related to the CalWIN projects throughout the M&O and CalWIN to CalSAWS Conversion phase. Michael possesses the ability to attentively listen to details and respond concisely and directly. His written communication skills can be described as clear, concise, and thorough, which he demonstrated during the highly visible CalWIN to CalSAWS Conversion project spanning around 4 years.

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

Michael is always cordial and willing to help his coworkers and clients. He maintains a positive working relationship with customers, asks for feedback, and is willing to make changes when needed. He has demonstrated his ability to collaborate, coordinate, and effectively work with a project team containing many internal and external stakeholders to achieve project goals.

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

Part 3 – The Reference Must Complete This Table.

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

Michael has successfully managed numerous technologically advanced projects sponsored by the Consortium, taking direct responsibility for the project management knowledge areas of scope, time, cost, human resource, risk, quality, integration, and communication. He has collaborated with Consortium, County, and State stakeholders to define project scope, conducted feasibility studies and cost analyses, and presented findings to management. Michael managed multiple teams simultaneously within Gainwell, coordinating projects to ensure high quality deliverables. Displayed a high level of effort and commitment towards completing assignments in a timely manner with thoroughness and accuracy. He handled enterprise and project-level risks, escalating issues to customers as necessary and implementing risk mitigation processes. As a manager, Michael effectively communicated information to all stakeholders in a timely manner, demonstrating strong communication skills.

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

Michael has a very clear understanding of the importance of engaging end users early in the project development process for the successful adoption of the solution. He proactively assigned Subject Matter Experts to work with the end users, gather user input, and define the project scope during the Business Strategic Meeting (BSM) for the CalWIN project engagement. He is transparent in providing updates to the customer and end user community, ensuring to present project progress in management meetings and providing presentations to help the user community embrace the change. He also worked with the training team to provide training to end users, offering user guides and training manuals. Additionally, he ensured client-level access to project tools and dashboards for visual project updates and utilized email communication to provide progress updates and gather feedback from end users. Furthermore, he took every opportunity to meet end users and clients in person, visiting client-county sites to collect feedback.

7. Would you rehire this person?

I absolutely would rehire Michael and will gladly provide a reference for hiring him.

8. Optional Comments:

Part 3 – The Reference Must Complete This Table.

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

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.

Josy G Thomas

Name of Reference (print)
(print)

Regional Government Services (RGS)

Name of Company Reference

Josy G Thomas

Digitally signed by Josy G Thomas
Date: 2024.07.25 09:27:10 -07'00'

Signature of Reference

7/24/2024

Date

Table 1 - Key Staff Reference Form

KEY STAFF REFERENCE FORM	
Key Staff Name: Michael Alan Johnson	
Part 1 – Reference's Information	
This information should match the information provided in Attachment 10 – Key Staff Resumes/Qualifications .	
Customer/Client Reference Name:	Paul Trisler
Customer/Client Reference Title	Conversion Manager
Agency, Department, Organization or Company where Staff member performed:	CalSAWS Consortium / Welfare Client Data Systems (WCDS)
Project Title on which Staff member performed	CalWIN / CalSAWS Conversion
Reference Phone Number:	(916)390-1957
Reference E-mail Address:	Ptrisler@mac.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.
Michael (and his team) were stellar players on my Conversion Team. They were the vendor for the source (legacy) system, so their performance was mandatory. However, he and his folks typically went above and beyond expectations that had been set by previous projects.

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

Reference my response to #1, above. Large scale conversions are difficult in the best of circumstances. They are made better by contractor staff that perform above and beyond expectations. Their attitude was more of a "what can we do to get this done successfully" rather than nit-picking scope and requirements as is typical with these types of engagements.

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

During this conversion engagement, new requirements were either discovered or needed because of the changing legislative landscape. When these new requirements were needed, the design response was clear and concise, never requiring more than a single round of comments. Verbal communication was similar, in that we all spoke the same Social Services "language," despite differences in the source system vs. the target system. Consequently, data mapping discussions tended to be relatively painless. Great partner to work with!

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

Michael and his team worked with another large vendor, and a large customer consortium (I was the customer consortium conversion lead.) While there's always some "storming and norming" that goes on, over the roughly 4-year engagement, the working relationships were nearly always positive. There were the occasional personality conflicts, on the whole, the entire 50+ member team performed exceptionally well, which would not have been possible without good, positive working relationships among members.

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

Experts! The staff assigned from Michael's team to my conversion team were the most senior, knowledgeable folks. We would not have been as successful as we were without the knowledge and experience Michael's team brought to the table from the source system team. Several of Michael's team members were members of the team that helped develop the source system 20+ years ago. What better knowledge and experience could a conversion manager hope for?

Part 3 – The Reference Must Complete This Table.

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

6. How well did the Contractor handled engagement with end users and User input. As counties came on the new system, following their conversion, Michael and his team were an integral part of the daily calls to answer questions about the conversion. Michael and his team members were known by the county team members, so there was already a connection. Questions were well received by Michael and team, as were criticisms. Fixes/updates were discussed, if a fix/update was needed, and requirements identified.

7. Would you rehire this person?

Yes, I would definitely hire Michael (and his team!) again for future projects.

8. Optional Comments:

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

10

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

Paul Trisler

Name of Reference (print)
(print)

Signature of Reference

CalSAWS Consortium

Name of Company Reference

July 25, 2024

Date