



STATE OF NEW YORK

Lot 3 IES Financial Management

February 10, 2022 | 03:00 PM EST
Electronic | Technical Proposal



Deloitte Consulting LLP

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February 10, 2022

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Robert Kennedy
NYS Office of Information Technology Services
Empire State Plaza, Swan Street
Core 4, Room 2404
Albany, NY 12223
Via email to its.sm.bestvalue@its.ny.gov

RE: SYSTEM INTEGRATOR TIER II: LOT 3 INTEGRATED ELIGIBILITY SYSTEM'S FINANCIAL MANAGEMENT

Dear Mr. Kennedy:

Deloitte Consulting LLP (Deloitte¹) is pleased to submit this response to Master Service Contract C000540 Lot 3 - Integrated Eligibility System's Financial Management (the "IES-FM"). We recognize the IES-FM solution is core to effective and efficient benefit service delivery to your residents and providers. With successful delivery of this important project, New York gains a modern, secure, and efficient statewide financial management solution that supports your human services programs. We are excited to help you achieve your IES-FM business goals and objectives.

Our proposal offers New York:

- Directly relevant experience gained through implementing and/or supporting Integrated Eligibility Systems in [REDACTED], including in county administered states
- Our market-leading, [REDACTED] accelerator that jump starts the IES-FM design and delivery
- An experienced team with 160+ years of IES, system development, and New York experience
- An iterative methodology, [REDACTED] that aligns with ITS' preferred delivery approach
- A thoughtful project schedule that engages your program office and ITS staff efficiently and effectively

ITS ultimately benefits by lowering the risk profile of the IES-FM project while delivering a quality IES-FM solution statewide.

Please note that in addition to our response to the core RFP requirements for the Technical response, we have included within our response the following:

¹ As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see 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.

- Appendix N: NYS Freedom of Information Law (FOIL) Disclosure Exemption Request (per section 52.2, *Public Information*, and the NYS Freedom of Information Law of Contract #C000657)
- Appendix O: Performance Bond Commitment Letter (per section 1.3 *Performance Bond Requirement* of the Amended SI Tier II Assignment - FM Module solicitation document)

We are looking forward to the opportunity to support you in this important project and to continue to serve ITS and the State. If you have any questions, please do not hesitate to contact me at +1 412 551 3750 or via email at jareilly@deloitte.com, or Dave Buck at dbuck@deloitte.com.

Sincerely,



Jason Reilly
Principal
Deloitte Consulting LLP
+1 412 551 3750
jareilly@deloitte.com



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ESP, SWAN STREET BLDG, CORE 4, 2ND FLOOR, RM 2404
ALBANY, NY 12223

IES SYSTEMS INTEGRATORS #

IES Financial Management

CONTRACTOR RESPONSE FORM

Contractor: Please convert this executed document to PDF, attach the PDF with the Contractor's full submission, and e-mail before the Systems Integrators (SI) Tier II Assignment deadline. The original hard copy should be sent via mail within two weeks from electronic submission.

The Contractor Submission must be fully and properly executed by an authorized person. By signing you certify your express authority to sign on behalf of yourself, your company, or other entity and full knowledge and acceptance of this Tier II Assignment (including any Questions/Answers or addendums), the Systems Integrator (SI) Tier I contract and that all information provided is complete, true, and accurate.
(Where Procurement Lobbying Law is applicable, by signing, Contractor affirms that it understands and agrees to comply with New York State procedures relative to permissible contacts. Information may be accessed at: Procurement Lobbying: http://www.ogs.ny.gov/aboutOgs/regulations/defaultAdvisoryCouncil.html)

The Office of Information Technology Services (ITS) will not be held liable for any cost incurred by the Contractor for work performed in the preparation of a proposal to this Tier II Assignment or for any work performed prior to the formal execution of an Agreement. Proposals to the Tier II Assignment must be received as specified in Key Dates and Events. Contractor assumes all risks for timely, properly submitted deliveries of this Tier II Assignment proposal. A Contractor is strongly encouraged to arrange for delivery of Tier II proposals prior to the date of the bid opening. LATE Tier II Assignment PROPOSALS may be rejected. The received time of Tier II proposals will be determined by the clock at the Authorized User's location.

Contractor's Federal Tax Identification Number
Contractor's NYS Vendor Identification Number
Legal Business Name of Company Responding (must match the SI Tier I Contract):
Deloitte Consulting LLP
D/B/A - Doing Business As (if applicable):
Systems Integrator Contract Number:
C000657
Contractor's Signature
Printed or Typed Name:
David A. Buck
Date: 2/3/2022
Title:
PRINCIPAL
[] CONTRACTOR DECLINES TO RESPOND TO THE TIER II ASSIGNMENT for the following reasons:
[] Insurance Affirmation: All insurance forms, including Professional/Technology Errors and Omission and Crime Coverage have been provided to OGS and are up to date.
[] Additional Incentives



INDIVIDUAL, CORPORATION, PARTNERSHIP OR LLC ACKNOWLEDGEMENT

STATE OF

M
M

SS.:

COUNTY OF

<https://nysemail.sharepoint.com/:w:/r/sites/IESProgram/Operations/Attachment%20%20-%20FM%20SI%20Draft.docx?d=w0f5e4445e870465c92e3bcb340b3bc1&csf=1&web=1>

On the 3rd day of February in the year 2022, before me personally appeared [redacted], known to me to be the person who executed the foregoing instrument, who, being duly sworn by me did depose and say that _ maintains an office at _____, and further that:

[Check One]

- If an individual: __ executed the foregoing instrument in his/her name and on his/her own behalf.
- If a corporation: __ is the _____ of _____, the corporation described in said instrument; that, by authority of the Board of Directors of said corporation, __ is authorized to execute the foregoing instrument on behalf of the corporation for purposes set forth therein; and that, pursuant to that authority, __ executed the foregoing instrument in the name of and on behalf of said corporation as the act and deed of said corporation.
- If a partnership: He is the a principal _____ of Deloitte Consulting LLP the partnership described in said instrument; that, by the terms of said partnership, _he is authorized to execute the foregoing instrument on behalf of the partnership for purposes set forth therein; and that, pursuant to that authority, _he executed the foregoing instrument in the name of and on behalf of said partnership as the act and deed of said partnership.
- If a limited liability company: __ is a duly authorized member of _____ LLC, the limited liability company described in said instrument; that _he is authorized to execute the foregoing instrument on behalf of the limited liability company for purposes set forth therein; and that, pursuant to that authority, _he executed the foregoing instrument in the name of and on behalf of said limited liability company as the act and deed of said limited liability company.

Leslie Alwadish

LESLIE ALWADISH
Notary Public, State of New York
NO. 01AL4852847
Qualified in New York County
Commission Expires Feb. 10, 2022

Notary Public
Registration No.



The information provided in response to this document should clearly describe the Contractor's approach to the project scope. The Contractor is to return a project plan and financial submission based on the above information. There cannot be any indication of financial information included within the technical proposal. The Contractor's proposal to this Tier II Assignment should address all elements listed below as included within the Tier II Assignment following the order listed in this document. Proposals will be evaluated based upon how well the description of the contents of the requirements and deliverables will meet the requirements of this Tier II Assignment. For each requirement and deliverable, please include a narrative that explains how your firm would approach producing the deliverable. Include the methodology, tools, techniques, and best practices that you would employ to produce each deliverable. Please provide all necessary information stated below, either by inserting below or via reference of an attachment. Bids not submitted according to these instructions may be considered nonresponsive. No extraneous elements or enhancements are to be included in the bid response.

When completing the Technical Proposal, **DO NOT** include any pricing information. Technical proposals must include the requested information below, in the order, and in some cases, using the provided charts. Technical proposals will be evaluated and scored based on how well the Bidder demonstrates that they can successfully undertake and complete a project of the scale and scope set forth in this Tier II Assignment. The percentages below represent the percentage or the 70 percent.

Section A: Executive Summary and Experience (5%)

Executive Summary:

The Bidder must submit an Executive Summary, not to exceed three pages in length that includes:

- (1) A concise description highlighting the Bidder's understanding of the requirements presented in the Tier II Assignment, ITS' needs, approach, and how the Bidder can assist ITS in accomplishing its objectives. The description provided should demonstrate the Bidder's understanding of (1) the scope of work included in the Tier II Assignment, and (2) the effort, skills, and processes necessary to successfully complete the software development services detailed in this RFP while adhering to the software development lifecycle (SDLC) prescribed by the State using State-defined tools, methodologies, and technologies and operating on a State-owned or prescribed platform.
- (2) A high-level summary describing the activities the Bidder is proposing to undertake and successfully execute the detailed scope of work as described in the Tier II Assignment.

Previous Experience:

The Bidder must describe their relevant previous experience and related experience within the public sector, which will be scored more favorably, not to exceed five pages in length that includes:

- (1) An overview of the Bidder's organization and experience relevant to the scope of this project.
- (2) A description of completed projects the Bidder previously worked on with similar in scope and size to this assignment.

SECTION A: EXECUTIVE SUMMARY AND EXPERIENCE

A.1 EXECUTIVE SUMMARY

RFP Requirement/Deliverable Addressed

The Bidder must submit an Executive Summary, not to exceed three pages in length that includes:

(1) A concise description highlighting the Bidder's understanding of the requirements presented in the Tier II Assignment, ITS' needs, approach, and how the Bidder can assist ITS in accomplishing its objectives. The description provided should demonstrate the Bidder's understanding of (1) the scope of work included in the Tier II Assignment, and (2) the effort, skills, and processes necessary to successfully complete the software development services detailed in this RFP while adhering to the software development lifecycle (SDLC) prescribed by the State using State-defined tools, methodologies, and technologies and operating on a State- owned or prescribed platform.

(2) A high-level summary describing the activities the Bidder is proposing to undertake and successfully execute the detailed scope of work as described in the Tier II Assignment.

Deloitte Consulting ("Deloitte") brings an experienced-based approach to implementing the Integrated Eligibility System Financial Management (IES-FM) Solution, based on New York's IT standards and technical framework, which meets the Office of Information Technology Services' (ITS) business objectives and successfully retires BICS, CBIC, and other legacy systems. ITS



- Delivery of the full IES-FM solution to UAT in 19 months using ITS's preferred iterative SDLC approach, supported by our

benefits from our experiences that includes 1) implementing IES-FM solutions across in the past 40 years, including in county-administered states, 2) previous project success in New York's human services ecosystem, and 3) our market-leading, that accelerates IES-FM solutions design, quality, and delivery. ITS ultimately gains by lowering the risk profile of the IES-FM project while delivering a quality solution that enables ITS stakeholders to conduct Financial Management, Vendor, and Provider activities statewide.

- Our non-proprietary accelerator jump starts the IES-FM's design and delivery.
- Relevant and recent experience from similar implementations nationally.
- A proposed IES-FM team with 180+ years of IES, system development, OTDA, and ITS-specific experience.

Figure A-1. Deloitte Brings the Capabilities and Experience to Provide Realistic, Holistic, and Disciplined Delivery of Lot 3 Modules.

A.1.1 WE UNDERSTAND ITS REQUIREMENTS AND OBJECTIVES

ITS requires the services of a **system integrator with extensive experience working in complex, multi-year, multi-vendor environments to deliver a modular IES-FM solution to support New York’s human services delivery.** Through the Lot 3 procurement, Deloitte understands ITS is looking to retire multiple legacy systems to put in place modern financial management, provider management, and vendor management functionality that services the myriad needs of New York's 58 Social Service Districts (SSDs). The size, scale and complexity of New York is unique. It requires coordination and stakeholder engagement with SSDs and New York City, coupled with managing the county-administered nature of human services in New York. This project requires experience-based design, development and testing of the IES-FM solution with SSDs, ITS’s staff, and stakeholders from multiple state agencies (e.g., OTDA, OCFS, DOH). It also includes working with SSD's that have multiple, custom, county-based systems on which they depend to provide benefits to New York residents, that are closely integrated with BICS, CBIC, and other systems. Deloitte recognizes ITS has established an IES Technology Framework and set of components that all vendors, across all Lots, need to use to build the modules envisioned in ITS’s IES to-be vision. It expects the vendor to use an iterative development process to deliver IES-FM solution increments using consistent processes, standards, and a transparent well-managed approach. Deloitte enables ITS’s success through our understanding of the overall IES program vision and ITS’s preferred SDLC approach, coupled with our extensive FM experience, capabilities, and a proven, time-tested approach.

HOW WE ACCOMPLISH IES-FM OBJECTIVES

Large, multi-year projects to build new information systems are inherently risky. Deloitte significantly reduces ITS’s project risk due to our market-leading IES experience, [REDACTED] which informs our IES-FM project approach, staffing, and tools. This enables ITS to be more confident in meeting the objectives of the IES-FM project, and the success of the broader IES program.

[REDACTED]	[REDACTED]
	[REDACTED]
	[REDACTED]
	[REDACTED]
	[REDACTED]
	[REDACTED]

A.1.2 HIGH-LEVEL ACTIVITIES SUMMARY FOR PROJECT SUCCESS

Our IES-FM delivery approach uses our [redacted] asset as a solution accelerator for designing the IES-FM solution on ITS's IES Technical Framework. [redacted] enables us to reduce ITS's risk by using a "starter kit" FM solution to help model NY's IES-FM solution. Based on ITS's RFP, we have organized our delivery into 15 development iterations across 5 capability groupings, each of which includes multiple solution increments, in alignment with ITS's preferred SDLC approach. We use ITS's prescribed tools, like Blueprint, to capture the to-be process flows and design the new IES-FM solution. Our PMP-certified management team closely tracks project activity using Jira and provides clear ownership of tasks, issues, risks, and deliverables across our joint team as we design, build, and rollout IES-FM aligning with New York's specific needs.

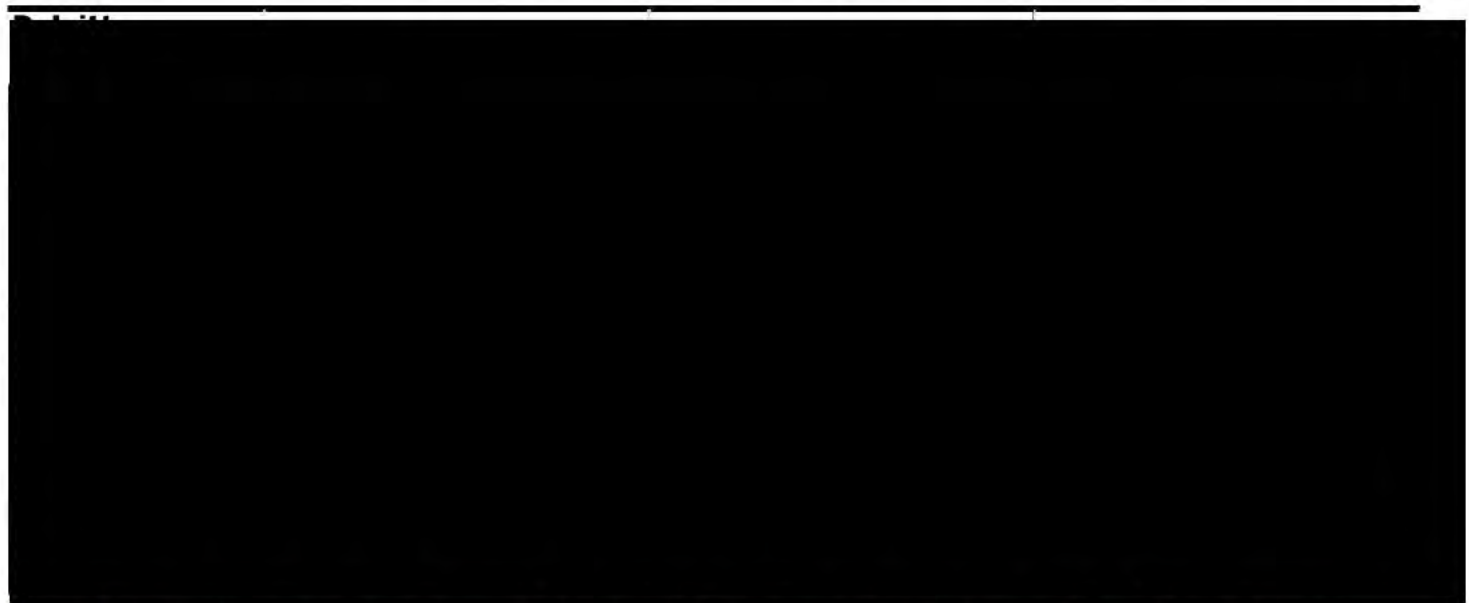


Figure A-3. How NY ITS Benefits by Reducing Risk and Realizing Demonstrable progress with Our Realistic Schedule.

Table with 2 columns: 'Our Approach to Project Success' and 'How it Benefits IES-FM'. It lists five key approach elements and their corresponding benefits to the project.

Figure A-4. How Our Approach Aligns with your Objectives for the FM Project.

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A.2 PREVIOUS EXPERIENCE

RFP Requirement/Deliverable Addressed

The Bidder must describe their relevant previous experience and related experience within the public sector, which will be scored more favorably, not to exceed five pages in length that includes:

- (1) An overview of the Bidder's organization and experience relevant to the scope of this project.
- (2) A description of completed projects the Bidder previously worked on with similar in scope and size to this assignment.

New York ITS benefits through reduced project delivery risk, more sustained and demonstrated progress, incremental IES-FM solution delivery, and a more comprehensive IES-FM solution based on our recent and directly relevant IES and FM experiences from [REDACTED]

A.2.1 OUR ORGANIZATION AND RELEVANT EXPERIENCE

Deloitte is the world's largest professional services firm (312,000 people worldwide) with over [REDACTED] [REDACTED] dedicated to our Government and Public Services (GPS) practice in the US alone. This includes individuals specializing in HHS service delivery that bring experience with FNS, ACF, CMS, state HHS agencies, and work [REDACTED] ITS benefits from our qualifications, capabilities, and understanding of New York as it provides a strong foundation to deliver this critical Lot 3 project. Below we highlight Deloitte's **directly relevant and recent experience** that make us the right choice and delivers confidence to help ITS on this important modernization journey.



Figure A-5. Deloitte Brings a National Experience based Network of Specialists for the IES-FM Project.

National Financial Management and Provider Management Solution Experience

Through 40+ years of dedicated service we have worked with states administering core public assistance and social services programs, including Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Public Assistance, Medicaid, Children's Health Insurance Program (CHIP), Home Energy Assistance Program (HEAP), Child Welfare, and Child Support. Systems we manage today [REDACTED]. The size of our HHS practice, [REDACTED]

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means we are better able to provide the right mix of experienced people for the IES-FM project. **For example, through our national network, we successfully** [REDACTED]

[REDACTED] Additionally, in 2012 we supported [REDACTED] of the Affordable Care Act's Medicaid, Modified Adjusted Gross Income (MAGI) standards. Recently we supported the COVID-related pandemic assistance to our clients.

Legacy System Modernization Experience

We bring a successful track record of modernizing HHS legacy FM and provider management mainframe solutions like BICS and CBICs from [REDACTED]

[REDACTED] We understand the [REDACTED]

[REDACTED]

[REDACTED]

State-Supervised, County-Administered Experience

New York is not alone in employing a state-supervised, county-administered structure for human services. This approach provides autonomy to counties but brings added engagement and communication complexity to projects like IES-FM. Our team brings a wealth of experience modernizing systems for states with this operational model. [REDACTED]

[REDACTED]. Through

intentional collaboration, Deloitte built a system that is flexible for counties' needs, and is also feature-rich and easy-to-use. We are also currently assisting the [REDACTED]

[REDACTED], and other aspects crucial to ITS's success in a state-supervised, county-administered environment.

Experience with Multi-Vendor Delivery Environments

Given the complexity of HHS program areas, Deloitte is often engaged in large IT projects with many vendors working collaboratively. [REDACTED]

[REDACTED] and works with

3 business planning vendors to deliver innovative solutions. This experience enables us to help ITS as it coordinates its multi-lot, multi-vendor environment.

Codified Experience – Our Leading, [REDACTED]

Deloitte brings our industry-leading thought leadership in designing and implementing customized HHS solutions using technologies that align with the ITS enterprise vision through [REDACTED]. [REDACTED] institutionalizes leading practices from the prior implementations, including recent states like [REDACTED] and is the culmination of our experience delivering IES solutions [REDACTED], and accelerates ITS's detailed requirements and design processes.

A.2.2 DESCRIPTION OF COMPLETED SIMLAR PROJECTS

The following figure lists state HHS projects that closely align to the size and scope of New York's IES-FM initiative that included all phases of the SDLC. Together, they issue [REDACTED] in SNAP, TANF/Public Assistance (PA), LIHEAP and Child Care benefits to tens of millions of US residents.

State and FM/Provider Management Systems	Benefit Delivery Programs	~ Annual Issuances
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
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[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
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[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

Figure A-6. Projects of Similar Size, Scope, and Complexity as IES FM Module Project.

IES FM PROJECT EXPERIENCE SPOTLIGHTS

We have included the following **three example projects** from our national IES portfolio that demonstrate our experience with FM solutions that are **directly similar to the size and scale** of the IES-FM project.

[Redacted]

NYS_CON_IES_Lot_3_FPM_MO-471196_2021-5006a_2

[Redacted]

- [Redacted]

- [Redacted]

- [Redacted]

[Redacted]

NYS_CON_IES_Lot_3_FPM_MO-471196_2021-5006a_2

[Redacted]

- [Redacted]

- [Redacted]
- [Redacted]

[Redacted]

- [Redacted]

- [Redacted]

- [Redacted]

[Redacted]

- [Redacted]

NYS-CCN-IES-Ltr-3-FPM-MQ-47185-2021-5000v-2

- [Redacted]

[Redacted]

- [Redacted]

- [Redacted]

- [Redacted]