**RFP 22-69116 BUSINESS PROPOSAL**

**ATTACHMENT E**

**Instructions: Please provide answers in the yellow shaded areas to all questions. Reference all attachments in the yellow shaded areas.**

***Business Proposal***

* + 1. **General (optional) -** Please introduce or summarize any information the Respondent deems relevant or important to the State’s successful acquisition of the products and/or services requested in this RFP.

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| Lifeline Youth & Family Services, Inc. (Lifeline) is a family and youth services organization with over 50 years of experience and success behind it. Early efforts focused on residential care for youth, but in 2000, Lifeline began providing home- and community-based services to families engaged with child welfare services and probation. We quickly saw the effectiveness—both in cost and results—of engaging youth and families, in their own homes and within the community.  Over the years, our organization has grown from a local provider to one of the largest statewide service providers in Indiana. We have staff located throughout the state and satellite offices in each region to meet the needs of more than 5,500 families—representing nearly 20,000 individuals—per year. With the financial, technical, and clinical resources and experience acquired by our team, we are well-poised to deliver Adoption and Guardianship Support Services to families statewide.  The chart below offers a “snapshot” of our growth and development over the years, from just prior to the launch of our home-based services program to the present day.   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | **1999** | **2004** | **2009** | **2017** | **2021 (projected)** | | Clients Served | 715 | 2,880 | 8,772 | 19,174 | 20,000+ | | Annual Budget | $1,825,892 | $4,034,706 | $11,357,465 | $32,757,691 | $41,080,959 | | Assets | $1,150,600 | $2,106,065 | $4,794,615 | $6,335,948 | $8 million + | | Staff Size | 45 | 80 | 224 | 505 | 600+ |   Lifeline is also actively pursuing Medicaid opportunities to be able to provide therapeutic options for families beyond their engagement with the Department of Child Services, increasing the stabilization and long-term success of families.  Simply stated, Lifeline has the reliability, reach, expertise, and manpower required to deliver on this request as the balance of this proposal will show.  **>** *A listing of Lifeline’s locations throughout the state has been included for reference as* ***Business Proposal Appendix A****.* |

* + 1. **Respondent’s Company Structure** - Please include in this section the legal form of the Respondent’s business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

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| Lifeline is a private, nonprofit organization with 501(c)3 tax-exempt status with the Internal Revenue Service that was originally incorporated in 1968 in the State of Indiana. In 2013, Lifeline was reincorporated under a new tax-identification number with 501(c)3 tax-exempt status (effective October 3, 2013) following a corporate restructure.   Lifeline provides services for children and families at risk for abuse, neglect, or delinquency. The primary activities and ventures of the organization include the following:   * Home-based family preservation services * Home-based family reunification services * Preschool and family outreach services for a low-income/at-risk Fort Wayne community * Aftercare / follow up services for adolescent youth leaving residential treatment * Foster parent groups   Through our home-based services programs and voluntary counseling services, our leaders, clinical team, and field staff have extensive experience working with children in foster placement, youth in kinship care, and foster parents, as well as post-adoptive families.  **>** *Information regarding Lifeline’s Certificate of Authority has been included as requested as* ***Business Proposal Appendix B****.*  **>** *A copy of Lifeline’s organizational chart, as well as a detailed chart of our Home-Based Services staff structure, have been included in this proposal package per RFP requirements and for your reference as* ***Business Proposal******Appendices C*** *and* ***D****.* |

* + 1. **Respondent’s Diversity, Equity, and Inclusion Information -** With the Cabinet appointment of a Chief Equity, Inclusion, and Opportunity Officer, on February 1, 2021, the State of Indiana sought to highlight the importance of this issue to the State. Please share leadership plans or efforts to measure and prioritize diversity, equity, and inclusion. Also, what is the demographic compositions of Respondents’ Executive Staff and Board Members, if applicable.

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| Over the past 8 months our leadership has been focused on issues of Diversity, Equity and Inclusion (DE&I) as follows:   * As a team, we review diversity of our workforce to ensure it aligns with our diversity of the clients that we serve. * Staff participated in a “pulse” survey related to DE&I in 2021. * In 2022, we have scheduled monthly DE&I qualitative conversation points centered on DE&I and linking back to our organization’s Tenets of Our Culture and mission. * Education on micro-aggressions and unconscious bias is being provided through our Learning Management System (LMS), Relias. * We are developing Employee Resource Groups as a subset of the existing Inclusion Committee. * We are committed to recruit and build diverse talent networks.   In addition to the actions taken above, 24% of our Executive Staff and board represent diversity in terms of gender or race/ethnicity and we are continually looking to broaden inclusion and diversity among our staff, board, and volunteers, as indicated in the appendix described below.  **>** *A copy of Lifeline’s Diversity, Equity, and Inclusion Policy has been included in this proposal package for your reference as* ***Business Proposal******Appendix E****.* |

* + 1. **Company Financial Information** - This section must include documents to demonstrate the Respondent’s financial stability. Examples of acceptable documents include most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why, and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information **should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.**

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| Lifeline approaches financial sustainability with consistent monitoring and a fiscally conservative mindset. Our leadership is continually looking for ways to operate more efficiently to conserve resources—regardless of current cash flow. It is this approach that has allowed Lifeline to persevere in times of economic downturn or changes in regulations.  Specifically, we maintain 10% of our revenues in cash on hand, along with 3 months’ worth of working capital in reserve to ensure continuous operation without layoffs, decreased benefits, or programming interruption in the event of an unexpected financial emergency.  *>**A copy of Lifeline’s most recent audited financial statements (which include the past two years’ income statements and balance sheets) have been included in this proposal package per RFP requirements and for your reference as* ***Business Proposal Appendix F****.*  *As you will note in our audited financial statements, Lifeline has a management agreement with Lasting Change, Inc., its sole member and supporting organization, to manage back office support, administration, and executive leadership. Documentation specific to Lifeline can be found on pages 24-27 of Appendix D. (These pages are cited on the audited financial statements, as well.)* |

* + 1. **Integrity of Company Structure and Financial Reporting** - This section must include a statement indicating that the CEO and/or CFO, of the responding entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

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| Lifeline’s CEO takes personal responsibility for the financial information supplied with this proposal, both in terms of accuracy and thoroughness. In addition, we can assure the integrity of our company structure and financial reporting due to the fact that: 1) our annual financial audit is completed by an external firm, 2) each member of our board of directors is required to annually complete and sign a Conflict of Interest Disclosure form, and 3) we do not have any current conflict of interest between Lifeline board members and vendors, which includes our auditing firm. |

* + 1. **Contract Terms/Clauses** - Please provide the requested information in RFP Section 2.3.6. Additional rows may be added if necessary.

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| **Contract Term (Identifier and Header)** | **Suggested Language Change** | **Rationale for Suggested Change** |
| Lifeline accepts the mandatory clauses and substantive terms in the proposed contract as worded. | | |

* + 1. **References** - Reference information is captured on **Attachment H** Respondent should complete the reference information portion of the **Attachment H** which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of **Attachment H** should be completed by the reference and **emailed DIRECTLY** to the State. The State should receive three (3) **Attachment Hs** from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. **Attachment H** should be submitted to [idoareferences@idoa.in.gov](mailto:idoareferences@idoa.in.gov). **Attachment H** should be submitted no more than ten (10) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

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| **Customer 1** |  |
| Legal Name of Company or Governmental Entity | Family Centered Treatment Foundation |
| Company Mailing Address | PO Box 225 |
| Company City, State, Zip | Great Falls, VA 22066 |
| Company Website Address | www.familycenteredtreatment.org |
| Contact Person | Janet Holden |
| Contact Title | Operations Director |
| Company Telephone Number | (703) 757-6243 |
| Company Fax Number | n/a |
| Contact E-mail | [janet.fuller-holden @familycenteredtreatment.org](mailto:Tim.Wood@familycenteredtreatment.org) |
| Industry of Company | Evidence-Based Program / Family Services |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | Drug & Alcohol Consortium of Allen County |
| Company Mailing Address | 532 W Jefferson Blvd |
| Company City, State, Zip | Fort Wayne, IN 46802 |
| Company Website Address | www.dacac.org |
| Contact Person | MaryClare Akers |
| Contact Title | Executive Director |
| Company Telephone Number | (260) 422-8412 |
| Company Fax Number | n/a |
| Contact E-mail | makers@dacac.org |
| Industry of Company | Youth Prevention / Outreach |
| **Customer 3** |  |
| Legal Name of Company or Governmental Entity | Buffington Consulting LLC |
| Company Mailing Address | PO Box 245 (1392 Tennyson Dr.) |
| Company City, State, Zip | Temperance, MI 48182 |
| Company Website Address | n/a |
| Contact Person | Kristine Buffington, MSW |
| Contact Title | Nationally Certified TF-CBT Trainer and Consultant |
| Company Telephone Number | (419) 764-5710 |
| Company Fax Number | n/a |
| Contact E-mail | Kbuffington46@hotmail.com |
| Industry of Company | Mental Health Training |

**2.3.8** **Registration to do Business** – Per RFP 2.3.8,Respondents providing the products and/or services required by this RFP must be registered to do business by the Indiana Secretary of State. The Secretary of State contact information may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent’s responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

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| Lifeline Youth & Family Services, Inc. is registered and in good standing with the Secretary of State. We are also registered as a bidder with the State of Indiana, as evidenced by our inclusion in the Buy Indiana directory.  *>**A copy of Lifeline’s Certificate of Existence has been included for your reference as* ***Business Proposal******Appendix G****. >**A copy of Lifeline’s Listing in the Buy Indiana Directory has been included for your reference as* ***Business Proposal******Appendix H****.* |

* + 1. **Authorizing Document -** Respondent personnel signing the Executive Summary of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

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| Our Executive Summary was signed by Mark W. Terrell, Lifeline’s CEO. He is legally authorized by to contractually commit the organization, as evidenced by the organization’s bylaws.  **>** *A copy of Lifeline’s corporate bylaws has been included as requested and for your reference as* ***Business Proposal Appendix I****.* |

* + 1. **Diversity Subcontractor Agreements**

1. Per RFP Section 1.21, Minority & Women’s Business Enterprises (MBE/WBE), explain the process followed to engage with potential MBE and WBE owned, Indiana certified businesses listed on Division of Supplier Diversity site. List the businesses invited to discuss the opportunity for potential partnership.

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| Lifeline had conversations with Netlogx, LLC (WBE), Axon Advisors, LLC (WBE), Montrell Partnerships, LLC (MBE), and Alpha Rae Personnel, Inc. (MBE) to discuss areas where they may be able to add value to our proposal with their contribution of skill and expertise. As we discussed partnerships involving processes and project coordination, we concluded that Axon Advisors was too new in this arena and did not feel comfortable pursuing a subcontract. We were interested in Montrell Partnerships, however, they determined that the size and needs of a subcontract under this proposal exceeded their scope in terms of volume and specific skillsets. Netlogx has both the capacity and the expertise to meet our objectives related to processes, so we have elected to partner with them. We also invited Alpha Rae Personnel, Inc. to work with us related to talent recruitment and training resources through the state, given their level of experience and expertise in that area. |

1. If not proposing a MBE or WBE subcontractor partnership, explain the rationale for declining to do so. Complete this for each category not proposed.

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| Not applicable. |

* + 1. **Removed at Request of the Agency**
    2. **General Information** - Each Respondent must enter your company’s general information including contact information.

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| **Business Information** |  |
| Legal Name of Company | Lifeline Youth & Family Services, Inc. |
| Contact Name | Liz Day |
| Contact Title | VP of Home-Based Services |
| Contact E-mail Address | [liz.day@lifelineyouth.org](mailto:liz.day@lifelineyouth.org) |
| Company Mailing Address | 4150 Illinois Road |
| Company City, State, Zip | Fort Wayne, Indiana 46804 |
| Company Telephone Number | (260) 745-3322 |
| Company Fax Number | (260) 745-0234 |
| Company Website Address | [www.lifelineyouth.org](http://www.lifelineyouth.org) |
| Federal Tax Identification Number (FTIN) | 32-0420745 |
| Number of Employees (company) | 425 |
| Years of Experience | 53 |
| Number of U.S. Offices | 18 |
| Year Indiana Office Established (if applicable) | 1968 |
| Parent Company (if applicable) | Lasting Change, Inc. |
| Revenues ($MM, previous year) | $41,582,962 |
| Revenues ($MM, 2 years prior) | $39,031,852 |
| % Of Revenue from Indiana customers | 99%+ |

* 1. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

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| Yes.   **>** *A copy of Lifeline’s Emergency Response Plan has been included for your reference as* ***Business Proposal******Appendix J****.* |

* 1. What is your company’s technology and process for securing any State information that is maintained within your company?

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| Lifeline has an existing, secure, HIPAA-compliant Electronic Health Records (EHR) software system—Evolv (through NetSmart)—which is used to store and track information related to referrals, services rendered, treatment plans, reports, contact information, billing details, and other data related to services rendered under State contracts.  In addition to using HIPAA-compliant software to protect client information, all staff (including administrative and support staff) receive training related to protecting data, such as abiding by HIPAA requirements and what to do in the event of an incidental exposure. In addition, staff identification badges are color coded to differentiate the level of information to which each staff has access based on a defined “need to know” basis. Finally, staff are required to review and sign annual statements related to protocols surrounding client confidentiality to ensure that staff throughout the organization understand their responsibilities related to this topic. |

* + 1. **Experience Serving State Governments -** Please provide a brief description of your company’s experience in serving state governments and/or quasi-governmental accounts.

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| Since its inception, Lifeline has been working with youth and families involved in the court system. Over the years, this has included decades of successfully working with DCS, local probation departments, Department of Corrections, and the Department of Education, as well as community-based service providers and other partners, as we deliver a wide array of services.  In recent years, this has included contracts around the State of Indiana to provide Older Youth Services, Family Preservation Services, Community Based Services, Family Centered Treatment, and Homebuilders programming. In managing multiple contracts, we have been consistent in delivering strong client outcomes; providing frequent communication with referral sources; submitting thorough and timely reports; and maintaining fidelity with evidence-based programming. This has been evidenced over the years by the number of contracts we manage and the expanded reach (statewide) we’ve been offered.  In addition, Lifeline is currently providing services under a Community Partners subcontract with SCAN, Inc. |

* + 1. **Experience Serving Similar Clients -** Please describe your company’s experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

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| As shared earlier, Lifeline has more than 50 years of experience and success behind it, including two decades specifically in home-based service delivery. During this time, our staff have worked alongside adoptive parents, children who have had a change in guardianship, and youth who have experienced multiple changes in their living arrangements.  In fact, we estimate that nearly 1 in 4 children served by our organization includes potential adoptive or guardianship options.  In addition, Lifeline is also conducting foster parent support groups around the state, in which many of the participants are pre-adoptive or pre-guardianship. We began with 3 regional locations two years ago and have grown to 8 regions—including 1 virtual group that serves foster parents anywhere in the state—with more on the way, adding to our breadth of experience in this area.  Specific experience and programming related to this population include the following:   * Residential treatment * Life-skill training * Individual, group, and family counseling * Safety plan creation / monitoring * Aftercare planning * Connection with community resources * Older Youth Services provision * Supervised Visitation   Finally, Lifeline currently has staff trained and implementing Trust-Based Relational Intervention (TBRI) with families. We have seen the impact of this evidence-based programming on families as it relates to adoption and guardianship issues. With this critical element in place, as well as a staff of more than 400, statewide coverage, and other infrastructural components, Lifeline is prepared to begin serving referrals at the beginning of this contract, eliminating any gap between providers.  Below is an example of a specific case we’ve served related to adoption and guardianship issues:  *Lifeline had the privilege of working with three siblings while they navigated the foster care and pre-adoptive system from 2018-2020. We had a hand in their journey from the time they entered care until they were adopted into their forever, permanent, stable, and loving home. During their time in care, they were in four different foster homes and the only stable aspect in their lives were the services they were receiving from Lifeline. Not only did Lifeline provide in-home therapy to the children, but also supervised visitation under very difficult circumstances. Sadly, the biological mother was not able to break free from her addiction and damaging relationships.*  *Our staff worked weekly with the children, processing their trauma that ranged from neglect and physical abuse to sexual abuse. The children (even the youngest) finally shared their truths through trauma narratives and drawings. Once the youth were placed in their pre-adoptive foster home, we were able to assist the family in understanding the behaviors of children with complex trauma. The foster parents were like sponges soaking up knowledge, providing grace to the boys, while demonstrating unconditional love despite the multiple times they boys acted out.*  *Eventually, the children were able to not only receive their love, but also—and more importantly—trust that the family’s love was unconditional. Lifeline was able to offer hope and support in the darkest and loneliest times for these children. Now they are 16, 15, and 7 and thriving in their new adoptive home.*  In addition, one of our foster parent support group attendees shared the following regarding our services:  *I really didn’t know how much I needed support as a foster parent! The facilitators gave me tools, resources, and tips on dealing with the process. We’ll continue to go to the groups as we’re now moving forward with a potential adoption. We’re so grateful for Lifeline and their support! - Foster Parent Support Group Participant*    We would welcome the opportunity to serve families like this and so many others throughout our state. Thank you for your consideration of our proposal. |