**RFP # 22-70670, Equipment Maintenance Management Program (EMMP)**

**BUSINESS PROPOSAL**

**ATTACHMENT E**

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

***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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| Remi understands and accepts the requirements and objectives set forth by the State of Indiana for an EMMP. Remi established the State’s EMMP in 2010 and has been the sole contractor since inception. We have the knowledge and experience to continue providing a solution for the State’s needs through our staff, technology, and pricing and will provide a seamless transition to the new contract. |

* + 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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| Remi Holdings, LLC is a limited liability company formed in Delaware. |

* + 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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| Remi is an Equal Opportunity Employer as defined by the Equal Employment Opportunity Commission. It is the policy of Remi not to discriminate against any employee or applicant for employment because of his or her race, color, religion, sex, sexual orientation, gender identity, national origin, or because he or she is an individual with a disability or disabled veteran, Armed Forces service medal veteran, recently separated veteran, or active-duty wartime or campaign badge veteran, or thereinafter referred collectively as "protected veterans." It is also the policy of Remi to take affirmative action to employ and to advance in employment, all persons regardless of their status as individuals with disabilities or protected veterans, and to base all employment decisions only on valid job requirements. This policy applies to all employment actions, including but not limited to recruitment, hiring, upgrading, promotion, transfer, demotion, layoff, recall, termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship, at all levels of employment. Remi provides qualified applicants and employees who request an accommodation due to a disability with reasonable accommodations, as required by law. Remi prohibits harassment of employees and applicants because they are individuals with disabilities or protected veterans. Remi also prohibits retaliation against employees and applicants for filing a complaint, opposing any discriminatory act or practice, assisting, or participating in any manner in a review, investigation, or hearing or otherwise seeking to obtain their legal rights under any Federal, State, or local EEO law requiring equal employment opportunity for individuals with disabilities and protected veterans. Remi has developed a written affirmative Action Program (AAP) which sets forth the policies, practices, and procedures that Remi is committed to in order to ensure that its policy of nondiscrimination and affirmative action for qualified individuals with disabilities and qualified protected veterans is accomplished. |

* + 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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| Remi has attached the financial documents as part of its RFP response (file name “RFP # 22-70670 ATT M\_CONFIDENTIAL). Remi was recently acquired by Bain Capital (BCPE), one of the world’s most prestigious private equity firms. As part of the Bain Capital expansive network, we have entered a strategic partnership with PartsSource, the leading online marketplace for replacement parts and services. This partnership will help advance greater value for our customers and provides even stronger financial stability for our organization. |

* + 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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| Remi’s Controller has taken personal responsibility for the thoroughness and correctness of the financial information supplied with this proposal. To ensure separation of audit functions, Remi utilizes an Independent Auditor to perform all its annual audits. |

* + 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** |
| D. Service Requirements  3. Coverage Policy | Remove “And shall not exclude: a. Repairs for damages caused by power surges. B. Human error or negligence.” | Remi provides a service agreement to cover corrective maintenance resulting from normal equipment wear and tear. A power surge, human error, or negligence resulting in an equipment failure are coming from outside circumstance and not the equipment failing. This is typical excluded coverage in a standard service agreement. |
| F. Account Management and Customer Service  3. Semi-Annual Market Analysis Report | Remove | Not applicable to this contract. |
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* + 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** is due on the 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 | State of Alabama Division of Risk Management |
| Company Mailing Address | 777 S. Lawrence Street, Suite 200 |
| Company City, State, Zip | Montgomery, AL 36104 |
| Company Website Address | <https://riskmgt.alabama.gov> |
| Contact Person | Max Graham |
| Contact Title | Risk Manager |
| Company Telephone Number | 334-223-6149 |
| Company Fax Number | 334-223-6154 |
| Contact E-mail | [Max.graham@finance.alabama.gov](mailto:Max.graham@finance.alabama.gov) |
| Industry of Company | State Government |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | New York State Department of Health Wadsworth Labs |
| Company Mailing Address | Wadsworth Center, David Axelrod Institute  120 New Scotland Ave. |
| Company City, State, Zip | Albany, NY 12208 |
| Company Website Address | [www.wadsworth.org](http://www.wadsworth.org) |
| Contact Person | Matthew Nichols |
| Contact Title | Health Program Administrator |
| Company Telephone Number | 518-474-8242 |
| Company Fax Number |  |
| Contact E-mail | Matthew.nichols@healthy.ny.gov |
| Industry of Company | State Government/Laboratory |
| **Customer 3** |  |
| Legal Name of Company or Governmental Entity | Commonwealth of Pennsylvania, General Services, Procurement |
| Company Mailing Address | 555 Walnut Street, Forum Place 6th Fl. |
| Company City, State, Zip | Harrisburg, PA 17101-1914 |
| Company Website Address | www.dgs.pa.gov |
| Contact Person | Cheryl Kleeman-Deimler |
| Contact Title | Operational & Facilities Commodity Manager |
| Company Telephone Number | 717-346-4326 |
| Company Fax Number | 717-783-6241 |
| Contact E-mail | [ckleemande@pa.gov](mailto:ckleemande@pa.gov) |
| Industry of Company | State Government |

* + 1. **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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| Remi Holdings, LLC has an active record with the Secretary of State. |

* + 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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| Remi’s Chief Executive Officer, Brent Howison, signed the Executive Summary of the proposal and is legally authorized by Remi to commit the organization contractually. No attachments are included. |

* + 1. **Diversity Subcontractor Agreements** -

1. Per RFP Section 1.21, Minority & Women’s Business Enterprises (MBE/WBE), and 1.22 Indiana Veteran Owned Small Business Subcontractor (IVOSB), explain process followed to engage with potential MBE, WBE and IVOSB 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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| As the incumbent for this contract, Remi has an established service vendor network based on the preferences of the program end users and the types of equipment currently covered. We have historically identified certified firms who have either lost their certification or closed their business during our contract with the State; however, we continually attempt to identify qualified businesses to help support utilization goals.  As part of the RFP requirements, Remi downloaded the current list of Diversity Certified Businesses from the Division of Supplier Diversity site, consisting of more than 10,000 certified businesses. The list was filtered to broadly include vendors with UNSPSC Descriptions which may be applicable to the services contemplated under an EMMP contract, resulting in approximately 130 potential businesses (primarily MBE certified).  From the 130 businesses, Remi researched the business and performed outreach via an initial and follow-up email to approximately 50 businesses to confirm if any were able to provide equipment repair service and support regarding the opportunity. Follow-up phone calls were placed to businesses where Remi deemed there was more potential opportunity for engagement based on their UNSPSC codes and website information. From our outreach, approximately 15% of the suppliers responded they were unable to assist with the opportunity. Additionally, no potential subcontractors attended the pre-proposal conference for Remi to communicate with further regarding the opportunity. |

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

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| Remi was unable to propose a WBE subcontractor as part of its response. From the list of certified businesses, only eight (8) WBE businesses were identified as potential opportunities based on UNSPSC Description. After further research of each WBE, only six (6) were contacted to present the opportunity. No WBE firm responded.  Remi was unable to propose an IVOSB subcontractor as part of its response. From the list of certified businesses, only seven (7) IVOSB businesses were identified as potential opportunities based on UNSPSC Description. All were contacted, with only one (1) business responding that they would not be able to assist with the contract.  While we will continue to monitor and research for potential vendors to utilize under the State’s EMMP, we have not identified any specific WBE or IVOSB business to include as part of our response. |

* + 1. **Evidence of Financial Responsibility** – **Removed at the 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 | Remi Holdings, LLC |
| Contact Name | Kristen Childers |
| Contact Title | Contract Manager |
| Contact E-mail Address | kristen.childers@theremigroup.com |
| Company Mailing Address | 6325 Ardrey Kell Road, Suite 200 |
| Company City, State, Zip | Charlotte, NC 28277 |
| Company Telephone Number | 888-451-8916 |
| Company Fax Number | 704-887-2916 |
| Company Website Address | www.theremigroup.com |
| Federal Tax Identification Number (FTIN) | 46-1553389 |
| Number of Employees (company) | ~130 |
| Years of Experience | 24 |
| Number of U.S. Offices | 1 (Charlotte, NC) |
| Year Indiana Office Established (if applicable) | N/A |
| Parent Company (if applicable) | BCPE Osprey, L.P. and in partnership with PartsSource, Inc. |
| Revenues ($MM, previous year) | REDACTED |
| Revenues ($MM, 2 years prior) | REDACTED |
| % Of Revenue from Indiana customers | ~1.15% |

* 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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| No. Remi has an Information System Contingency Plan (ISCP) which establishes comprehensive procedures to recover Remi information systems quickly and effectively following a service disruption. Information systems are vital to Remi’s mission/business processes; therefore, it is critical that services provided by the information system can operate effectively without excessive interruption. The ISCP consists of an activation and notification phase, recovery phase, and reconstitution phase. Responsibilities are designated to organizational personnel and provide guidance recovering the information system(s) during prolonged periods of interruption. The ISCP ensures coordination with other personnel responsible for Remi contingency planning strategies and ensures coordination with external points of contact and vendors associated with the information system and execution of the plan. |

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

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| As a state government and federal contractor, Remi’s Information Technology Department is required to ensure information we receive from our customers remains secure. Our IT team follows the NIST 800-53 cybersecurity and data protection framework. We use a secure server room and keep current antivirus software configured to scan on a scheduled basis and configured so users cannot disable the scan. Our systems have access controls in place based on roles with restricted access or removal. Multi-Factor authentication is used to access Remi’s network and penetration and security vulnerability tests are performed. In addition, Remi employees are required to complete cybersecurity trainings which are documented for each employee on a periodic basis. |

* + 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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| Remi is the leading EMMP provider for state government programs. We presently administer 25 statewide programs, some of which have been competitively awarded and renewed for more than 15 years. We provide EMMPs for some of the largest states and systems of higher education in the country as well as numerous federal government accounts, healthcare facilities, research institutions and private companies.  As the incumbent, Remi has provided an EMMP to the State of Indiana since 2010. Remi’s employees are familiar with government accounts and have the experience and resources to support and develop the State’s EMMP. Through its continual program support, Remi has built a reputation in the marketplace as a knowledgeable and reliable EMMP administrator. |

* + 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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| **State of Alabama**  Remi was awarded the State of Alabama’s EMMP via competitive solicitation three (3) times, beginning in 2005 to date. Remi covers nearly 6,000 items of equipment with cumulative total savings of approximately $19MM. Remi’s account team managed the entire process of implementing the program at the agency and department level. This consisted of end user trainings and support, service provider support, verifying the equipment to place on the program, and establishing the invoicing requirements for the agencies. Remi provides the State of Alabama and all participating agencies with detailed online reporting. Remi works closely with the State in marketing the program to all agencies and departments to continue providing an opportunity to participate in the EMMP.  **State of New York**  Remi began the state of New York’s EMMP in 2002 and the contract has been competitively awarded several times to date. Remi manages an average of 24,000 maintenance events for the State each year. Due to Remi’s history with the State, virtually every State agency has equipment enrolled in the program. The State realizes a contracted savings off maintenance agreements and the program continues to develop with a total cost savings of nearly $20M since program inception. After 20 years of supporting the program with administrative management, program development, and program progress reports, Remi continues to strive to increase both the scope and reach of the program.  In addition to the two overviews provided above, Remi has developed 25 statewide programs, saving departments and agencies from their previously held service agreements. |

* + 1. **Payment – Removed at the request of the agency.**
    2. **Extending Pricing to Other Governmental Bodies** –Indicate your willingness to extend prices of awarded products and/or services to other governmental bodies per RFP section 2.3.17. Please include details on any marketing or active solicitation activities your company will undertake to encourage use of the contract.

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| Yes, Remi will extend its pricing to other governmental bodies. Remi has already expanded the State’s EMMP to include several institutions of higher education and will continue to promote the program to expand its utilization among other governmental bodies.  We understand most maintenance contracts are housed in individual agencies and departments; therefore, significant time and resources are required to continually educate potential program participants about the EMMP. Remi has developed many statewide programs through its marketing efforts consisting of phone calls, emails, and virtual and on-site meetings. We will dedicate representatives to actively pursue all organizations eligible to use the State’s contract to encourage its use. |