**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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| Through many years of research, J WAYNE MOORE PHD, LLC has developed the nationally branded cost tables product known as Moore Precision Cost®. The company intends to utilize its research, experience, knowledge and methods to provide the turnkey construction cost conversion services specified in Section 1.4 of RFP 215-24-77471. |

* + 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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| J WAYNE MOORE PHD, LLC is a Limited Liability Company founded in Ohio in 2008, with one managing member. The company has been authorized to conduct business in Indiana since 2010. Although the founder’s son is not a legal member of the LLC, he is actively involved in company operations and is the designated successor of the company. The company has no employees. |

* + 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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| The company has no employees, hence no diversity plan or policy. The founder and sole member of the company is a white military veteran. |

* + 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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| The CONFIDENTIAL signed personal financial statement of J. Wayne Moore for the years ended December 31, 2002 and December 31, 2023 are provided in a separate document and must be handled as non-disclosable confidential personal information under IC 5-14-3-4 (a) (5). |

* + 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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| The Sole Member of the company (J. Wayne Moore) has taken personal responsibility for the thoroughness and correctness of all financial information supplied with this proposal. |

* + 1. Contract Terms/Clauses - Please provide the requested information in RFP Section 2.3.6.

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| All mandatory contract clauses are accepted. Proposed additions and changes to non-mandatory contract clauses are:  **1. Duties of Contractor**. Insert the following:  “The Contractor shall perform the services specified in paragraphs 1.4 A. 2) and 1.4 E. 2 of RFP 215-24-77471.”  **2. Consideration**. Modify the words “paid at the rate of” to read “paid a fixed fee of”  **28. Insurance**. Change all amounts stated as $5,000,000 to state $2,000,000 to be consistent with our coverage.  **36. Ownership of Documents and Materials**. Insert new paragraph C:  C. Contractor has a library of documents, spreadsheets, and models that it has created over a period of many years through its own research and development prior to the execution of this Contract, which comprise Trade Secrets of Contractor that are used to maintain its Moore Precision Cost® nationally distributed product. In order to provide the construction cost schedule conversion services, Contractor plans to create derivatives of said Trade Secret documents, spreadsheets, and models to prepare the specified deliverables in final form ready for use by assessors. Such derivatives of said Trade Secret documents, spreadsheets, and models shall be separately licensed to the State with no additional fee if required by the State to maintain the specified deliverables in the future and shall be non-disclosable under the Access to Public Records Act. The specified deliverables in the final form ready for use by assessors as defined in paragraph 1.4 of RFP 215-24-77471 shall be Materials as defined in paragraph A of this Section 36. |

* + 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 | Indiana Department of Local Government Finance |
| Company Mailing Address | 100 North Senate Avenue, Room N1058(B) |
| Company City, State, Zip | Indianapolis, IN 46204 |
| Company Website Address | https://www.in.gov/dlgf/ |
| Contact Person | Barry Wood |
| Contact Title | Assessment Division Director |
| Company Telephone Number | (317) 232-3777 |
| Company Fax Number | (317) 974-1629 |
| Contact E-mail | BWood@dlgf.in.gov |
| Industry of Company | State Government |
| Customer 2 |  |
| Legal Name of Company or Governmental Entity | Illinois Department of Revenue |
| Company Mailing Address | 101 W. Jefferson Street |
| Company City, State, Zip | Springfield, Il 62702 |
| Company Website Address | https://tax.illinois.gov/ |
| Contact Person | Adrianne Suits Bailey |
| Contact Title | Property Tax Division Manager |
| Company Telephone Number | (217) 785-6636 |
| Company Fax Number |  |
| Contact E-mail | adrianne.bailey@illinois.gov |
| Industry of Company | State Government |
| Customer 3 |  |
| Legal Name of Company or Governmental Entity | Oklahoma State University  Center for Local Government Technology |
| Company Mailing Address | 1201 S Innovation Way Drive, Suite 400 |
| Company City, State, Zip | Stillwater OK 74078 |
| Company Website Address | <https://ceat.okstate.edu/extension/clgt/> |
| Contact Person | Gary Snyder |
| Contact Title | Director |
| Company Telephone Number | (405) 744-6049 |
| Company Fax Number |  |
| Contact E-mail | Gary.snyder@okstate.edu |
| Industry of Company | Higher Education |

**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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| J WAYNE MOORE PHD, LLC has been registered to do business with the Indiana Secretary of State since 7/29/2010 and is a registered bidder (ID 0000025645). |

* + 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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| As the Sole Member of a Limited Liability Company, J. Wayne Moore is the only person legally authorized to commit the organization contractually. The Ohio Secretary of State LLC certificate dated 8/1/2008 is attached. |

* + 1. Subcontractors - The Respondent is responsible for the performance of any obligations that may result from this RFP and shall not be relieved by the non-performance of any subcontractor. Any Respondent’s proposal must identify all subcontractors and describe the contractual relationship between the Respondent and each subcontractor. Per instructions in Attachment J, either a copy of the executed subcontract or a letter of agreement over the official signature of the firms involved must accompany each proposal.  
         
       Any subcontracts entered by the Respondent must be in compliance with all State statutes and will be subject to the provisions thereof. For each portion of the proposed products and services to be provided by a subcontractor, the technical proposal must include the identification of the functions to be provided by the subcontractor and the subcontractor’s related qualifications and experience.

The combined qualifications and experience of the Respondent and any or all subcontractors will be considered in the State’s evaluation. The Respondent must furnish information to the State as to the amount of the subcontract, the qualifications of the subcontractor for guaranteeing performance, and any other data that may be required by the State. All subcontracts held by the Respondent must be made available upon request for inspection and examination by appropriate State officials, and such relationships must meet with the approval of the State.  
  
The Respondent must list any subcontractor’s name, address, and the state in which formed that are proposed to be used in providing the required products and/or services. The subcontractor’s responsibilities under the proposal, anticipated dollar amount for subcontract, subcontractor’s form of organization, and an indication from the subcontractor of a willingness to carry out these responsibilities are to be included for each subcontractor. This assurance in no way relieves the Respondent of any responsibilities in responding to this RFP or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority Business Enterprise, Women’s Business Enterprise, or Veteran Owned Business under IC 4-13-16.5-1 and IC 5-22-14-3.5. [See Sections 1.21](file:///C:/Working%20Documents/Sourcing%20Documents/RFP_Bid%20Template%20Review/IDOA%20RFP%20Boilerplate%20E-BID%20v06-15-2020_rac%20review%2006292021.docx#_1.21_MINORITY_&), [1.22](file:///C:/Working%20Documents/Sourcing%20Documents/RFP_Bid%20Template%20Review/IDOA%20RFP%20Boilerplate%20E-BID%20v06-15-2020_rac%20review%2006292021.docx#_1.22_INDIANA_VETERAN) and Attachments A/A1 for Minority, Women, and Veteran Business information.

IVOSB entities (whether a prime or subcontractor) must have a Bidder ID. If registered with IDOA, this should have already been provided (as with MWBEs). IVOSBs that are only registered with the Federal Center for Veterans Business Enterprise will need to ensure that they also have a Bidder ID provided by IDOA (please see [section 2.3.7](file:///C:/Working%20Documents/Sourcing%20Documents/RFP_Bid%20Template%20Review/IDOA%20RFP%20Boilerplate%20E-BID%20v06-15-2020_rac%20review%2006292021.docx#_2.3.7_Registration_to) for details).

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| No subcontractors will be used. |

* + 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 | J WAYNE MOORE PHD, LLC |
| Contact Name | J. Wayne Moore |
| Contact Title | Principal |
| Contact E-mail Address | jwayne.moore@gmail.com |
| Company Mailing Address | 2071 N Bechtle Ave |
| Company City, State, Zip | Springfield OH 45504 |
| Company Telephone Number | (937) 408-7342 |
| Company Fax Number |  |
| Company Website Address | www.mooreprecisioncost.com |
| Federal Tax Identification Number (FTIN) | 26-3033130 |
| Number of Employees (company) | One (1) member, no employees |
| Years of Experience | 30+ |
| Number of U.S. Offices | One |
| Year Indiana Office Established (if applicable) | NA |
| Parent Company (if applicable) | NA |
| Revenues ($MM, previous year) | See confidential personal financial statement |
| Revenues ($MM, 2 years prior) | See confidential personal financial statement |
| % Of Revenue from Indiana customers | None |

* 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. Complete backups of all files are made on a schedule and stored in another secure location. Norton utilities are used to protect from internet threats. |

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

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| We use Dell computers and store all data locally rather than in the cloud, and make frequent backups that are stored off-site. We will not require retrieval of State information. |

* + 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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| We have served State and Local governments for more than 30 years. They are our primary customers. |

* + 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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| J Wayne Moore PHD, LLC is uniquely qualified to perform the requested turnkey construction cost conversion services that meet the requirements defined in Section One of the solicitation. The company previously provided those services to the Indiana Department of Local Government Finance and also provided very similar services for the Illinois Department of Revenue (IDOR). The current cost schedules published by the IDOR for use by Illinois assessors were created by us under contract with the State during 2017 to 2019. The cost documents are Publications 122 (Farm), 123 (Residential), 126 (Commercial & Industrial), and 127(Component-in-Place Schedules) and can be accessed on the Illinois Department of Revenue website. As part of that project, we worked with the IDOR staff to modernize and improve their cost models and schedules. We are providing similar services for commercial cost data through a current contract with the Oklahoma State University Center for Local Government Technology for Oklahoma county assessors. Also, the company’s Moore Precision Cost® product is the only nationally available alternative to widely used cost tables by assessors. |

* + 1. Indiana Preferences - Pursuant to IC 5-22-15-7, Respondent may claim only one (1) preference. For the purposes of this RFP, this limitation to claiming one (1) preference applies to Respondent’s ability to claim eligibility for Buy Indiana points. Respondent must clearly indicate which preference(s) they intend to claim. Additionally, the Respondent’s Buy Indiana status must be finalized when the RFP response is submitted to the State.

Approval will be system generated and sent to the point of contact email address provided within the Bidder Registration profile. This is to be attached as a screenshot (copied/pasted) for response evaluation.

Buy Indiana

Refer to Section 2.7 for additional information.

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| No preferences are claimed. |

* + 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.

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| We will extend prices to other governmental bodies. |