**22-70333 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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| Milliman has a longstanding history of collaboration providing healthcare consulting services to the State of Indiana. We have a deep commitment to protecting the health of people everywhere and support the Division of Mental Health and Addiction (DMHA) in its goals to meticulously assess and update the Indiana Administrative Code (IAC) as it pertains to the provision of mental health and addiction services in the state. Milliman brings a highly experienced, deeply knowledgeable, and multi-disciplinary team with specific Indiana behavioral health and regulatory experience, including direct knowledge and participation in the IAC drafting process. Moreover, our firm possesses a broad bench of behavioral health subject matter experts and policy analysts we can rely on to assist with this work as needed. Our healthcare policy team members are accomplished professionals with far-reaching industry knowledge, expertise, and experience with projects that require in-depth, meticulous policy analysis, development, and implementation. This includes work with both State and Federal agencies, research and analysis, stakeholder outreach and engagement, and significant experience with projects specific to increasing the availability of mental health and addiction care in local communities.  Milliman is uniquely poised to support DMHA on this important initiative to assess and revise the agency’s administrative code. Our team members have worked with and for behavioral health providers, patient consumer/advocates, health plans, and state agencies. We intimately understand that access to behavioral healthcare is one of the most pressing challenges faced by States today. We also appreciate that the COVID-19 pandemic has only added an increased urgency to this crisis and the demand for these services has escalated quickly over the past two years. The Milliman team for this project is comprised of behavioral health experts with unmatched knowledge and experience with the entire range of issues in the mental health and addiction space and who understand the challenges faced by states in this present moment. This knowledge and experience include a deep familiarity with issues pertaining to topics such as coverage, access and availability, workforce, and different treatment and delivery models.  We have partnered on projects with states across the country as they attempt to increase the availability of and access to mental health and addiction treatment services for their residents. As an example, we are currently working with a state in designing and planning implementation of a statewide CCBHC care delivery model. The project includes policy research to identify a path to secure appropriate authorities, actuarial analysis to develop sound dates and estimate budget impacts, and stakeholder engagement activities to ensure mental health and addiction treatment providers, and other important stakeholders are bought in and informed ahead of implementation. In short, our team members understand all sides of the project and can advise the state in an efficient, actionable manner, well-suited to solve for its particular needs.  Furthermore – and of particular relevance to this project – our team includes several attorneys with legal expertise and abundant experience with state legislative and administrative codes. Multiple members of our team have direct experience working with the Indiana Family and Social Services Administration, state legislature, and several other state agencies both during and prior to their tenure at Milliman.  This combination of in-depth subject matter expertise in behavioral health policy and extensive experience with the State of Indiana and its rules promulgation process uniquely positions this team to complete this work in a manner that ensures that Title 440 is modernized to reflect the highest standards and practices. We are also confident that our analyses of emerging behavioral health issues will enable DMHA to make informed decisions on future programs and initiatives that will promote and support mental health and wellness for Hoosiers. |

* + 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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| Milliman's legal form of business is a corporation formed in the state of Washington in 1957. Milliman is among the world's largest providers of healthcare consulting and related products and services. The firm has consulting practices in healthcare, property & casualty insurance, life insurance and financial services, and employee benefits. Founded in 1947, Milliman is an independent firm with offices in major cities around the globe. The breadth and depth of our knowledge also enables us to create customized solutions for our clients in an efficient and effective manner. As a firm, Milliman has provided actuarial services to state Medicaid agencies and health plans in over 40 states for more than 25 years. Please see Attachment 7 included with our proposal for our corporate organizational chart. |

* + 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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| **Milliman Efforts to Measure and Prioritize Diversity, Equity, and Inclusion**  Diversity, equity, and inclusion are core to Milliman’s mission to protect the health and financial well-being of people everywhere. In July 2020, Milliman’s global health practice director established our Racial Disparities in Healthcare initiative in response to employee interest in finding ways to use Milliman time, talent, and intellectual property to contribute to the conversation about race and equity both inside and outside our company. The RDWG’s membership represents a diverse panel of Milliman consultants who work together to “promote research that shines a light on racial disparities in the healthcare system.” The RDWG achieves this objective through:   1. Proactively identifying, funding, and staffing Milliman health research projects on health equity. 2. Promoting team diversity for consulting projects to ensure that multiple points of view are represented. 3. Reviewing project work to ensure sensitivity to our DEI objectives. 4. Promoting overall awareness of developments and trends in racial disparities research, health equity, and the evolving national conversation about race and diversity.   Since its launch the initiative has supported analysis-based research on topics including studies on:   * Disparities in cardiovascular conditions experienced by Black people compared with that of white people * Specific oral healthcare measures and the impact of racial disparities on access to dental services * Developing fair models; avoiding bias in artificial intelligence models * The relationship between race and access to preventive services for patients with type-2 diabetes * The impact of redlining on access to healthcare services   Milliman is also actively working to identify and compile healthcare data sources that can be used to support racial disparities researchers both inside and outside Milliman. By including everyone and drawing on differences in who we are, what we have experienced, and how we think, we are able to deliver services that exceed the expectations of our clients, strengthen our communities, and provide opportunities for all. We are driven by the understanding that our actions have long-term effects on our employees, our clients, and ultimately, society.  Milliman is proud to have a strong relationship with many minority- and women-owned businesses. As a vendor supporting public sector agencies throughout the United States, we actively cultivate, secure, and mentor underrepresented businesses. We have also developed a formal supplier diversity program, and in June 2022, we are hosting our annual Small and Diverse Subcontractor Symposium. Through this outreach, we grow our supplier base while continuing to develop relationships and mentor businesses within our network. Our focus on partnering with minority and women owned business has led us to 10 state contracts where we bring MBEs and WBEs to the table including: Alaska, Illinois, Indiana, Kentucky, Michigan, New York, Ohio, Pennsylvania, and South Carolina.  We further demonstrate our commitment to these principles through community investments and activities such as:   * Financial and advisory support to the International Association of Black Actuaries and the Organization of Latino Actuaries * The Milliman Opportunity Scholarship for college students pursuing STEM majors who are members of ethnic groups and races that are under-represented in these fields * Financial support of the Equal Justice Initiative and Facing History and Ourselves * Financial and volunteer support to the Actuarial Foundation Math Motivators program, tutoring students in mathematics in diverse school districts in underserved communities * Supporting the Microinsurance Centre at Milliman which advises governments, non-governmental organizations, and private companies on using microinsurance products to help protect vulnerable populations against risk.   At Milliman we strive to protect people’s health and financial well-being as core to our mission. We encourage the state to explore our commitment to equity on our website at <https://www.milliman.com/en/social-impact>. Our commitment to social impact and sustainability (SIS) is a visible aspect in everything we do. We consistently frame it in terms of Our Work, Our People, and Our World:   * **Our Work** allows us to serve a full spectrum of business, financial, government, union, education, and nonprofit organizations. Milliman’s body of consulting professionals is both deep and wide, including the full range of professional expertise needed to support our four primary practice areas: healthcare, life insurance and financial services, property and casualty, and employee benefits. Our teams work together to achieve our company’s mission to protect the health and wellness of people everywhere. * **Our People** are our most precious resource, and our goal is to create an environment that recognizes and meets our employees’ personal and professional needs. The Racial Disparities Work Group (RDWG) is one example of how we are actively supporting employee interest in SIS. Other examples include our Employee Resource Groups (ERG), which are employee-led groups empowered to influence policies, develop future leaders, and increase employee engagement. These groups, which are each formed around a common interest, background, or demographic factor, include the Milliman Black ERG, Military and Veterans ERG, MilliWomen ERG, Pride ERG, and Unidos ERG. * **Our World** dedicates us to giving back in our communities where we live and work and taking responsibility for our impact on the environment. Throughout our history, consultants and staff have generously contributed their time and talents to improve the quality of life in our communities. Some of these contributions include Milliman offices supporting organized volunteer activities for employees and their families to serve their communities, ongoing support of the Wendell Milliman Scholarship Fund and the Stuart Robertson Memorial Scholarship and participating in a matching gift program that matches employee contributions to registered nonprofit organizations.   **Demographic Compositions of Milliman’s Executive Staff/Board**  As requested, below please find the demographic compositions of Milliman’s Executive Staff and Board Members:   |  |  | | --- | --- | | **Total Count** | 9.00 | | **Male (% of members)** | 56% | | **Female (%)** | 44% | | **White** | 89% | | **Asian** | 11% | |

* + 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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| Please see Attachment 2 included with our proposal for Milliman’s most recent Dunn & Bradstreet Business Report. |

* + 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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| Milliman engages an independent third-party auditor, Moss Adams ("Auditor"), to audit Milliman's consolidated financial statements. Milliman's management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error. The Auditor's responsibility is to express an opinion on these consolidated financial statements based on its audits.  The Auditor conducted its audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that the Auditor plan and perform the audits to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the Auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the Auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, the Auditor expresses no such opinion.  An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by Milliman's management, as well as evaluating the overall presentation of the consolidated financial statements. The Auditor believes that the audit evidence it has obtained is sufficient and appropriate to provide a basis for the Auditor's audit opinion.  Please see Attachments 4 and 5 included with our proposal for a statement from our Auditor indicating management's responsibility for the consolidated financial statements and Auditor's responsibility. |

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

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| Please see Attachment 6 included with our proposal for an exceptions list summarizing the requested changes to the state’s legal terms and conditions. |

* + 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 two (2) **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 | Michigan Department of Health and Human Services |
| Company Mailing Address | 320 South Walnut Street |
| Company City, State, Zip | Lansing, Michigan 48913 |
| Company Website Address | <https://www.michigan.gov/mdhhs> |
| Contact Person | Jeffery Wieferich |
| Contact Title | Director, Bureau of Community Based Services |
| Company Telephone Number | 517.256.6358 |
| Company Fax Number | 517.335.5376 |
| Contact E-mail | [Wieferichj@michigan.gov](mailto:Wieferichj@michigan.gov) |
| Industry of Company | Medicaid Agency |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | Alaska Department of Health and Social Services |
| Company Mailing Address | 3601 C Street, Ste 934 |
| Company City, State, Zip | Anchorage, AK 99503 |
| Company Website Address | <https://dhss.alaska.gov/> |
| Contact Person | Gennifer Moreau-Johnson |
| Contact Title | Director, Division of Behavioral Health |
| Company Telephone Number | 907.269.4804 |
| Company Fax Number | 907.269.8166 |
| Contact E-mail | [gennifer.moreau-johnson@alaska.gov](mailto:gennifer.moreau-johnson@alaska.gov) |
| Industry of Company | Medicaid Agency |

* + 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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| Milliman, Inc is actively registered to do business within the State by Indiana Secretary of State and the Indiana Department of Administration, Procurement Division. Please see Attachment 3 included with our proposal for our Indiana Certificate of Existence. |

* + 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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| Please see Attachment 1 included with our proposal for proof of authority for Paul Houchens to commit Milliman contractually. |

* + 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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| a. **Axon Advisors LLC** ,  333 N. Alabama St., Suite 350 Indianapolis, IN 46204, incorporated in the state of Indiana.  b. Axon Advisors will support Milliman on this RFP in the following ways:  • Subject matter expertise  • Regulatory expertise with Indiana Administrative Code  • Assist with the drafting of new rules and the promulgation process  c. $116,919.60  d. Axon Advisors LLC operates as a Limited Liability Corporation.  e. **Attachment A1** **– IVOSB Subcontractor Commitment Form & Letter of Commitment** and **Attachment 11 – Milliman Teaming Agreement** show a strong indication from Axon Advisors LLC of a willingness to carry out their responsibilities as a subcontractor for this project  f. Axon Advisors LLC qualifies as an Indiana Veteran Owned Small Business; see **Attachment 9** for the Certification Letter. | a. **Lawrance Policy Consulting LLC**, 14575 Sherwood Forest Way, Fishers, IN 46307,  incorporated in the state of Indiana.    b. Lawrance Policy Consulting will support Milliman on this RFP in the following ways:  • Stakeholder engagement  • Development of stakeholder outreach and engagement plan  • Lead, conduct interviews, meetings, and focus groups with the spectrum of stakeholders and invested interests  c. $72,000.60  d. Lawrance Policy Consulting LLC operates as a Limited Liability Corporation.  e. **Attachment A – MBE/WBE Subcontractor Commitment Form & Letter of Commitment** and **Attachment 11 – Milliman Teaming Agreement** show a strong indication from Lawrance Policy Consulting LLC of a willingness to carry out their responsibilities as a subcontractor for this project.  f. Lawrance Policy Consulting LLC qualifies as a Women Owned Business; see **Attachment 9** for the Certification Letter. | a. **Mangas Global Solutions, Inc.,** 8800 North St., Fishers, IN 46038,  incorporated in the state of Indiana.  b. Mangas Global Solutions will support Milliman on this RFP in the following ways:  • Project management and administrative support  • Development of comprehensive project management plan  • Tracking progress of plan, identifying potential project risks, and ensuring timely deliverables  c. $31,508.40  d. Mangas Global Solutions, Inc., operates as an S Corporation.  e. **Attachment A – MBE/WBE Subcontractor Commitment Form & Letter of Commitment** and **Attachment 11 – Milliman Teaming Agreement** show a strong indication from Mangas Global Solutions of a willingness to carry out their responsibilities as a subcontractor for this project.  f. Mangas Global Solutions, Inc., qualifies as a Minority Owned Business; see **Attachment 9** for the Certification Letter. |

* + 1. **Evidence of Financial Responsibility** – Removed at request of 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 | Milliman, Inc. |
| Contact Name | Paul R. Houchens |
| Contact Title | Principal and Consulting Actuary |
| Contact E-mail Address | [paul.houchens@milliman.com](mailto:paul.houchens@milliman.com) |
| Company Mailing Address | 10 W Market Street, Suite 1600 |
| Company City, State, Zip | Indianapolis, Indiana 46204 |
| Company Telephone Number | (317) 639-1000 |
| Company Fax Number | N/A |
| Company Website Address | <https://us.milliman.com/en/> |
| Federal Tax Identification Number (FTIN) | 91-0675641 |
| Number of Employees (company) | 4500 |
| Years of Experience | 75 |
| Number of U.S. Offices | 30 |
| Year Indiana Office Established (if applicable) | 1994 |
| Parent Company (if applicable) | N/A |
| Revenues ($MM, previous year) | $1.405B in 2021 |
| Revenues ($MM, 2 years prior) | $1.307B in 2020 |
| % Of Revenue from Indiana customers | 0.3% in 2021 |

* 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, Milliman has a formal disaster recovery plan. Business continuity and disaster recovery are critical elements of Milliman’s strategy to safeguard client information and ensure timely service delivery. Milliman business units have disaster recovery programs that are regularly tested. Milliman’s wide area network has multiple points of redundancy to ensure prompt recovery of telecommunications services. This includes but is not limited to a fully meshed network, multiple firewalls configured for high availability, and 24/7 support from Verizon. Each business unit develops its own disaster recovery plan according to the Milliman template for Disaster Recovery and addresses the specific needs and threats to that business unit’s location. Each business unit includes procedures in its plan for data backup and recovery, equipment recovery, and business restoration. Milliman’s business units can operate independently in the event of a business outage of another unit.  In order to safeguard protected health information, we do not typically share the contents of our disaster recovery plan. This is a very technical document and disclosure in the public domain could compromise its integrity. We would be happy to meet with the state and review the details of the plan if requested. |

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

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| Milliman takes its responsibility to protect electronic data seriously. Milliman has a comprehensive information security policy based on the ISO 27001 risk management framework. In 2021, Milliman achieved HITRUST certification. Considered the gold standard for data security in the healthcare sector, the HITRUST framework leverages numerous standards including NIST, ISO, HIPAA and COBIT. By meeting the stringent requirements of HITRUST certification, clients can be confident that Milliman is protecting their sensitive, valuable, or highly regulated data.  Milliman has also implemented a number of layered controls and safeguards, including administrative policies and procedures and automated systems. These controls are employed in a defense in depth arrangement to secure electronic information stored on our systems. Administrative controls include staff awareness and local involvement in security administration. Every Milliman employee signs Milliman’s Employee Trade Secret and Client Information Agreement. Access to every Milliman office is monitored and key network equipment is secured. Security incidents are promptly reported to management, including the chief legal officer and information security officer. Electronic safeguards include preventive and detective controls. Milliman has contracted with a major telecommunication provider to maintain and manage a secure wide-area virtual private network. This network is protected by a layered system of firewalls and intrusion detection and prevention systems monitored 24/7 for security incidents by a third-party managed security services provider.  In addition, key telecommunication facilities are housed in vendor-secured facilities. The implementation of these controls is based on the requirements of the data being protected. Milliman’s controls include corrective procedures. Like all networks, the Milliman network has experienced unsuccessful network attacks, viruses, and other malicious incidents. Milliman’s network administrators work with Corporate IT and our vendors to identify and intervene in these attacks. Using available utilities and reports, Milliman mitigates threats as they arise. |

* + 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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| For over 25 years, Milliman has been a national leader in healthcare consulting. With current contracts in over 20 states and territories, we provide comprehensive and coordinated policy development, financing strategy, and actuarial consulting to help our state clients succeed. Milliman’s highly knowledgeable team and strong cross-functional structure has enabled us to successfully assist states across the country in meeting their goals.  As detailed in Attachment F, our experience includes significant experience supporting a variety of behavioral health initiatives in states on issues relating to coverage and access, workforce, treatment, and care delivery models, amongst others. Our behavioral health policy work has spanned multiple types of state government agencies, including state Medicaid agencies, departments of insurance, and behavioral health divisions, among others. The breadth of this experience across multiple agency types has given us broad exposure to statutes and regulations for this subject, in addition to an appreciation for the types of issues often raised by stakeholders and the necessary program components to serve consumers in need.  In addition to our long history of serving states more generally, Milliman has been a longstanding consultant to the Indiana Family and Social Services Administration, with experience partnering with all of FSSA’s individuals divisions, including DMHA. Further, we have assembled a project team consisting of individuals who have direct state experience working with the State of Indiana, both as state employees and in a consulting role. While we provide a wide range of healthcare consulting services to these states, our work in many of these state has included projects focused specifically on behavioral health and substance abuse treatment, from program design and implementation to regulatory analysis, assistance to obtain grants or federal authorities, and evaluations of access and quality outcomes. Throughout our history, Milliman’s work has often focused on first-in-kind program designs, helping states innovate to better serve consumers or encourage additional providers to join their programs through new funding mechanisms or streamlined administrative processes.  The depth and breadth of our state experience paired with our robust team of policy professionals makes Milliman uniquely qualified to provide Indiana with the high quality and insightful expertise necessary for the Administrative Code Assessment.  Current Milliman state clients (and the duration of our service to these states) are listed below.   |  |  | | --- | --- | | **Current Milliman State Clients** | | | **State** | **Years of Service** | | Alaska | 6 years | | Arkansas | 4 years | | Florida | 23 years | | Hawaii | 17 years | | Idaho | 12 years | | Illinois | 24 years | | Indiana | 22 years | | Kentucky | 2 years | | Michigan | 25 years | | Minnesota | 30 years | | Mississippi | 14 years | | New Hampshire | 19 years | | Ohio | 11 years | | Puerto Rico | 21 years | | Rhode Island | 3 years | | South Carolina | 14 years | | Utah | 12 years | | Vermont | 10 years | | Washington | 26 years | | Wisconsin | 7 years | |

* + 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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| Milliman has a deep bench of behavioral health subject matter experts and policy analysts we can rely on to assist with this work as needed. Our healthcare policy team members are accomplished professionals with far-reaching industry knowledge, expertise, and experience with projects that require in-depth, meticulous policy analysis, development, and implementation. This includes work with both State and Federal agencies, research and analysis, stakeholder outreach and engagement, and significant experience with projects specific to increasing the availability of mental health and addiction care in local communities.  Our team members have worked with and for behavioral health providers, patient consumer/advocates, health plans, and state agencies. We intimately understand that access to behavioral healthcare is one of the most pressing challenges faced by States today. We also appreciate that the COVID-19 pandemic has only added an increased urgency to this crisis and the demand for these services has escalated quickly over the past two years. The Milliman team for this project is comprised of behavioral health experts with unmatched knowledge and experience with the entire range of issues in the mental health and addiction space and who understand the challenges faced by states in this present moment. This knowledge and experience include a deep familiarity with issues pertaining to topics such as coverage, access and availability, workforce, and different treatment and delivery models.  Milliman has partnered on projects with states across the country as they attempt to increase the availability of and access to mental health and addiction treatment services for their residents. As an example, we are currently working with a state in designing and planning implementation of a statewide CCBHC care delivery model. The project includes actuarial analysis to develop sound dates and estimate budget impact, policy research to identify a path to secure appropriate authorities, and stakeholder engagement activities to ensure mental health and addiction treatment providers, and other important stakeholders are bought in and informed ahead of implementation.  Stakeholder engagement is a core piece of nearly all our work and, as a result, our team has a magnitude of experience developing robust and dynamic engagement strategies that carefully consider every element and detail of the stakeholder landscape in the states where we work. Our lengthy experience operating in the behavioral health space allows us to identify the key players and accurately assess who is the most likely to impacted by specific policy chances and who needs to be incorporated in the process to gather needed information and ensure buy-in.  This experience starts with our internal team who has an abundance of experience conducting stakeholder interviews and focus groups with a wide range of people and organizations, including patients and consumers of behavioral healthcare, providers, insurers, and regulatory bodies. We are currently working in several states where we are conducting intensive stakeholder outreach.  Below are several representative samples of our work serving similar clients:  **State Mental Health Code Review:** Milliman was tasked with reviewing a state’s Mental Health Code and corresponding regulations to determine the responsibilities of various agencies providing behavioral health services for that state. Milliman analyzed and summarized the entirety of the Code and the regulations and created a comprehensive report that organized the provisions by topic. By summarizing and organizing the code, Milliman assisted the state in building its understanding of the Code’s content and laid the groundwork for both a contract amendment and a change int eh cost methodology utilized by the agencies contracted with the state.  **Behavioral Health Managed Care Program Design:** Milliman was retained by a state to provide policy, operational, actuarial, and financial consulting services related to the implementation of a behavioral health managed care program. This behavioral health program intends to support and coordinate care for children and families whose needs span multiple health care delivery systems including child welfare. The scope of this project included research of regulatory requirements as well as provider rate development for several new wraparound services. While there are numerous other aspects of this project, stakeholder facilitation activities have been a critical part of the value Milliman has provided to the state for this project. As part of the provider rate development process, Milliman typically performs a comprehensive stakeholder engagement process to ensure the rates are reasonable and appropriate for the service and population. For this specific project, the stakeholder engagement process included arranging and facilitating discussions with existing groups of stakeholders to review the developed rates, assumptions, and consistency with proposed administrative code rules. We met with key stakeholders to review the methodology and modeling approach.  **1115 Substance Use Disorder Waiver Development:** Milliman was asked to assist a state client with the analysis and development of an 1115 waiver for substance use disorder. This process required the critical analysis of current program offerings and the capacity of the state to increase the availability of substance use disorder treatments to meet CMS requirements for 1115 waivers. This process required research and stakeholder engagement to determine the current levels of both public and private treatment options. Following the initial assessment of current treatment options, Milliman provided the client with potential opportunities for growth and development of treatment options. These recommendations included opportunities for treatment initiation, treatment retention, and improved treatment quality all with the goals of improving access to care and reducing readmissions.  **Medicaid Benefits Assessment:** Milliman was asked to assist a state Medicaid agency in responding to a legislative request to understand the scope of Medicaid covered benefits as compared to other types of healthcare coverage. We performed a detailed review of both state and federal statutes, regulations, and policy documents to understand any coverage mandates and/or restrictions that would apply to each service type, across physical health, behavioral health and substance abuse treatment, and long term services and supports. To support this analysis, we created a detailed grid to outline the requirements by service type, population group, and whether the service was federally mandated or optional to provide, among other criteria. We then pulled benefit and coverage requirements for both the state employee plan as well as the Marketplace benchmark plan for that state, so that we could compare this information to the Medicaid coverage regulations. In several cases, we brought in clinical and coding expertise to validate the collected benefits information, as well as to assure our understanding of what services would align for mental health parity requirements. Finally, we prepared a summary report that the agency could utilize in communicating the results with the state legislature and other key stakeholders.  **Care Management Program Development:** Milliman was retained by a state client that asked for assistance improving a member-focused care management structure for their Medicaid managed care program. One of the key features of this project was stakeholder engagement with payors, members, and care management providers. We discussed the current landscape of the care management work with several stakeholders to understand what was working and what could be improved. After these discussions, we identified key areas for improvement, discussed possible options with the client, and then designed an improved care management structure that was all-encompassing of the members needs while creating greater provider integration and communication between all health care providers for each individual member.  In addition to these examples, we are also pleased to share the experience of one of our subcontractors proposed for this project, Lawrance Policy Consulting LLC, who brings specific experience conducting stakeholder engagement with behavioral health providers and other healthcare providers in the state of Indiana:  **External Quality Review Organization (EQRO) Stakeholder Interviews:** As an external quality reviewer for the Indiana Office of Medicaid Policy and Planning, Lawrance Policy Consulting (LPC) developed and managed several projects interviewing Indiana behavioral health providers across Indiana. During one such project, LPC interviewed Indiana behavioral health providers across the state to evaluate the managed care organizations’ provider relations departments to understand the quality of the MCOs’ interaction with the providers. On another EQRO project, LPC conducted stakeholder engagement with Indiana behavioral health providers about their Alcohol and Other Drug HEDIS measures of Initiation and Engagement of Treatment. |

* + 1. **Payment –** Removed at request of agency.
    2. **Extending Pricing to Other Governmental Bodies** – Removed at request of agency.