**RFP 22-70333**

**Administrative Code Assessment**

**ATTESTATION FORM**

**ATTACHMENT J**

***Respondent Name:***

|  |
| --- |
| ***Milliman, Inc*** |

1. **Mandatory Submissions and Requirements**: Disagreement with these items may result in the response being disqualified.

|  |  |
| --- | --- |
| Section 1.10 Pricing | Have read and meet this requirement |
| Section 2.3.6 Mandatory Contract Terms/Clauses | Have read and understand this section |
| Section 3.2 Executive Summary | Have completed, signed, and submitted |
| Section 3.2 Attachment A: Minority and Women Business Enterprise form | Have completed, signed, and submitted  or  Opting not to submit |
| Section 3.2 Attachment A1: Indiana Veteran Owned Small Business form | Have completed, signed, and submitted  or  Opting not to submit |
| Section 3.2 Attachment C: Indiana Economic Impact | Have read, completed, and submitted |
| Section 3.2 Attachment D: Cost Proposal (Excel Workbook) | Have completed and submitted |
| Section 3.2 Attachment E: Business Proposal | Have completed and submitted |
| Section 3.2 Attachment F: Technical Proposal | Have completed and submitted |

1. **Confirm mutual understanding and submission.**

|  |  |
| --- | --- |
| 2.3.6 Contract Terms/Clauses | Confirm Respondent’s Legal Representation has read, and accepts Sample Contract language.  or  Confirm Respondent’s Legal Representation has read, and submitted alternative language per section 5.0 and 6.0 of this attachment. |
| 1.15 and 2.2.5 Confidential Information:  The complete list of Confidential and Redacted files is specified in section 4.0 of this attachment. | Have read, and submitted  or  Have read, and does not apply to response |
| 2.2.1 Agreement with Requirements listed in Section One of RFP | Have read, and agree |
| 2.2.2 Ability and Desire to Supply the Required Products or Services | Have read, and agree |
| 2.3.10 Subcontractors | Have read, agree, listed subcontractors in 7.0 of this attachment and submitted documents  or  Have read, and does not apply to response |

1. **Claim clarification**

|  |  |
| --- | --- |
| 2.7 Buy Indiana | YES claiming  or  NO, not claiming |
| 2.7 Buy Indiana | System generated notification submitted  or  Status Letter on company letterhead submitted |

1. **Confidential / Redacted File: confirm submission if applicable**

More rows may be inserted if necessary

Responses must include the following required information:

* List all documents or sections of documents, for which statutory exemption to APRA;
* Specify which statutory exception of APRA applies for each document or section of the document;
* Provide a description explaining how the statutory exception to the APRA applies for each document or section of the document; and
* Provide a separate redacted or confidential, whichever is applicable, version of the document. File name should use the following format:
* (insert rfp #)\_(insert Att letter)\_CONFIDENTIAL
* (insert rfp #)\_(insert Att letter)\_REDACTED
* More rows may be inserted if necessary

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Filename** | **Document Section** | **Document**  **Page #** | **Statutory exception reference** | **Rationale for application of the statute** | **Submitted** |
|  |  |  |  |  |  |
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1. **Attachment B, B1-3 summary of proposed sample contract changes**

More rows may be inserted if necessary

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| --- | --- | --- |
| **Section** | **Topic** | **Rationale for suggested change** |
| Professional Services Contract Section 28. | Insurance | -The changes are required by Contractor’s insurance carriers and/or risk management group.  -The changes make this contract consistent with the current Professional Services Contract between the parties. |
| Professional Services Contract Section 36.C. | Ownership of Documents and Materials | -Contractor does not take on liability for disclosure of Contractor’s work to third parties.  -The changes make this contract consistent with the current Professional Services Contract between the parties. |
| Professional Services Contract Section 52. | Limitation of Liability | Contractor does not perform services without a limitation of liability. |

1. **Respondent additional attachments**

More rows may be inserted if necessary

|  |  |
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| **Filename** | **RFP Attachment Reference** |
| Attachment 1 - Cert of Corp Sec - Paul R. Houchens | RFP 22-70333 - Att. E Business Proposal |
| Attachment 2 - Dun + Bradstreet Report 2021 | RFP 22-70333 - Att. E Business Proposal |
| Attachment 3 - IN Certificate of Existence | RFP 22-70333 - Att. E Business Proposal and Executive Summary |
| Attachment 4 - Milliman 2020 Audited Financial Statements | RFP 22-70333 - Att. E Business Proposal |
| Attachment 5 - Milliman 2021 Audited Financial Statements | RFP 22-70333 - Att. E Business Proposal |
| Attachment 6 - Milliman Inc RFP 22-70333-Exceptions List | RFP 22-70333 - Att. E Business Proposal |
| Attachment 7 - Milliman Corporate Org Chart | RFP 22-70333 - Att. E Business Proposal |
| Attachment 8 - Resumes | RFP 22-70333 - Att. F Technical Proposal |
| Attachment 9 - MBE WBE IVOSB State Certifications | RFP 22-70333 - Att. E Business Proposal |
| Attachment 10 - Letters of Commitment | RFP 22-70333 - Att. E Business Proposal |
| Attachment 11 - Teaming Agreements | RFP 22-70333 - Att. E Business Proposal |
| Attachment 12 - Sample Project Plan | RFP 22-70333 - Att. F Technical Proposal |
| Attachment 13 - Project Progress Report | RFP 22-70333 - Att. F Technical Proposal |

1. **Subcontractors per RFP 2.3.10**

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|  |  |  |
| --- | --- | --- |
| **Subcontractor Name** | **Function to be performed** | **Document Submitted** |
| Axon Advisors | * Subject matter expertise * Regulatory expertise with Indiana Administrative Code * Assist with the drafting of new rules and the promulgation process | Executed contract  Letter of Agreement |
| Lawrance Policy Consulting | * Stakeholder engagement * Development of stakeholder outreach and engagement plan * Lead, conduct interviews, meetings, and focus groups with the spectrum of stakeholders and invested interests | Executed contract  Letter of Agreement |
| Mangas Global Solutions, Inc | * Project management and administrative support * Development of comprehensive project management plan * Tracking progress of plan, identifying potential project risks, and ensuring timely deliverables | Executed contract  Letter of Agreement |