

## Executive Summary

May 9, 2023

Teresa Deaton-Reese  
Indiana Department of Administration  
Procurement Division  
402 West Washington Street, Room W468  
Indianapolis, Indiana 46204

RE: State of Indiana Department of Family and Social Services Request for Proposal #23-75072  
Solicitation for Indiana Pathways for Aging Member Support Services

Dear Ms. Deaton-Reese,

Maximus US Services, Inc. (Maximus) is pleased to provide our response to the Indiana Department of Family and Social Services' (FSSA) Request for Proposal (RFP) for Indiana Pathways for Aging Member Support Services.

We carefully reviewed the RFP in its entirety, along with all addenda, and followed all instructions in RFP Section Two, Proposal Preparation Instructions, for providing Indiana Department of Administration (IDOA) with our Submission Part One and Submission Part Two.

### Summary of Ability and Desire to Supply the Required Products or Services



#### Pathway to a Future State

Maximus brings to FSSA our ability, desire, and commitment to provide beneficiary support services for Hoosiers who are members in Indiana's Medicaid managed long-term services and support (MLTSS) program known as the Indiana Pathways for Aging program. As FSSA launches this new program, Indiana needs a partner:

- With a thoughtful approach and demonstrated ability to implement successful change that supports stakeholders as they adopt new roles and new processes
- Whose work is characterized by engaged, accountable collaborations that streamline access to services and maximize program stability
- With a commitment to person-centered interactions and outcomes for members, including assistance with sensitive cases and navigating grievances and appeals
- That already offers Indiana outstanding operational and technological staff surrounded by a robust infrastructure with tools to continually track and improve the quality and impact of our services on programmatic objectives
- Who delivers what FSSA needs right now, and will grow with the State and Indiana's healthcare landscape to continue to serve Hoosiers with excellence

As your partner and the nation's leading provider of high-quality, conflict-free Member Support Services (MSS), we will continue to use our nationwide expertise and Indiana-specific experience to meet and exceed your expectations. Our conflict-free policies extend to all subcontractors and suppliers partnering with us on this scope of work, prohibiting business connections and financial ties with health plans.



#### Supporting Members Through Complex Programs

Large-scale program transformations — like transitioning to MLTSS — can be confusing for citizens seeking long-term services and for providers working in a new environment. Our proposed solution builds upon our proven history of aligning with FSSA and its stakeholders to implement transformative programs, and experience

supporting other states transitioning to MLTSS. Maximus knows how to deliver unparalleled MSS and how to keep the member at the center of the process, making sure the right assistance is provided at the right time and in the right way.

We recognize the importance of effectively engaging stakeholders to build confidence when transitioning to MLTSS. Transparency and collaboration build trust, which is why we communicate early and often with stakeholders. Our processes and technology are used by the LTSS Enrollment Services stakeholders already, minimizing the risk associated with bringing a new vendor and new systems online. We build on this established stakeholder engagement and bring change management and communications strategies to effectively anticipate and address stakeholder concerns and inform them about the transition process.



#### **Streamlined Collaboration Across MLTSS Landscape**

[REDACTED]

[REDACTED]

[REDACTED]

Pathways for Aging members can rely on Maximus as the access point to provide easy, efficient, and streamlined services during the intricate transition to MLTSS.

#### **Maximus Comprehensive Solution Overview**

Providing excellent Member Support Services to Hoosiers is at the heart of Maximus' core capabilities and aligns with our mission of *Moving People Forward*®. As your partner, we will continue to use our nationwide expertise and Indiana-specific experience to meet and exceed your expectations. [REDACTED]

[REDACTED]

Maximus offers FSSA a Pathways for Aging services solution informed by nationwide expertise and tailored to Indiana. Because of our extensive experience transitioning states to MLTSS and working with individuals with complex care needs, we know how to provide the right staffing, person-centered member services, technology-supported processes, and stakeholder supports. [REDACTED]

[REDACTED]

[Redacted]

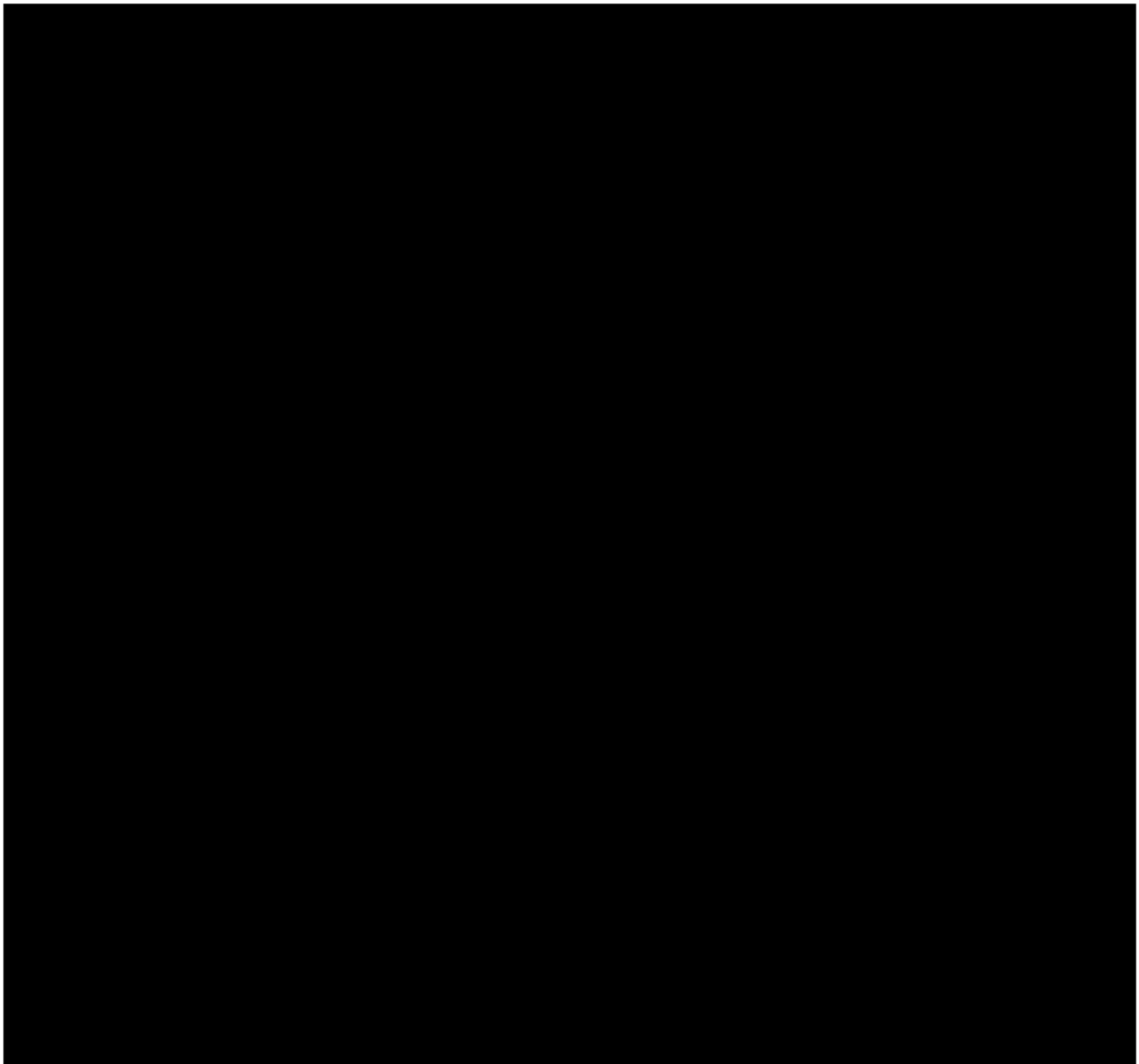
[Redacted]

Throughout this program, members will have access to high-quality service and support and consistent messaging across access points. We improve member experience, working to help create a smooth transition to the Pathways for Aging program. [Redacted]

[Redacted]

[Redacted]	
[Redacted]	<ul style="list-style-type: none"><li>[Redacted]</li><li>[Redacted]</li><li>[Redacted]</li><li>[Redacted]</li><li>[Redacted]</li><li>[Redacted]</li></ul>

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***Maximus Qualified and Experienced Staffing***

Our highly qualified personnel have the education, credentials, skills, and experience to meet all MSS requirements. FSSA can be confident its members will receive exceptional service and the State will meet its performance objectives. [REDACTED]

[REDACTED]

[REDACTED]

**Maximus Exceeding Equal Opportunity Commitment**

We are committed to providing meaningful opportunities for Minority and Women Business Enterprises (MWBEs) as well as Indiana Veteran-owned Small Businesses (IVOSB). We use detailed corporate and project-level procedures to select and manage our subcontractors, including MWBEs and IVOSBs, to align the viability and capacity of our chosen partners.

**Signature of Authorized Representative**

Tariq Khan, Senior Director – Contracts and Legal Counsel, is authorized by the Board of Directors of the Corporation to commit Maximus to the representations in our proposal and to certify that the information in our proposal meets the RFP's general conditions, including the requirement to provide audited financial statements. Mr. Khan also has the authority to sign all contractual documents pertaining to this proposal. This authorization is provided on behalf of the Corporation in accordance with internal procedures adopted by the Corporation. Evidence of Mr. Khan's authority to commit Maximus is provided in *Appendix E.4: Proof of Signing Authority of our Business Proposal* in Submission Part Two.

**Principal Point of Contact**

The principal contact for this proposal is Nancy Shanley, Vice President – Consulting and Policy Analysis. Ms. Shanley has over 30 years of experience working with, managing programs for, and consulting with states and Centers for Medicare and Medicaid Services regarding individuals with long-term care needs. She provides extensive consultation to states regarding a wide variety of services, including member support. Ms. Shanley is also a respected national presenter and has delivered numerous speeches and presentations on various aspects of LTSS and MLTSS.

Maximus understands that we will be notified via email regarding this solicitation, and have provided Ms. Shanley's contact information below:

Name:	Nancy Shanley, Vice President - Consulting and Policy Analysis
Address:	1600 Tysons Blvd, Suite 1400, McLean, VA 22102
Telephone No.:	615.473.4554
Email address:	<a href="mailto:USProposals@maximus.com">USProposals@maximus.com</a>

**Secretary of State Status**

Maximus US Services, Inc. is incorporated in the State of Indiana and registered as a Domestic For-Profit Corporation, FEIN 26-0307682, with the Indiana Secretary of State. Maximus holds an Active business status under Business ID # 2007060700050, as shown in *Exhibit 4: Maximus Active Registration Status in Indiana*. In addition, Maximus maintains Bidder registration with the Indiana Department of Administration (IDOA) under Bidder ID: 0000019888. Maximus uses North American Industry Classification System (NAICS) Code is 541611.

BUSINESS INFORMATION		
HOLLI SULLIVAN INDIANA SECRETARY OF STATE 09/15/2022 04:25 PM		
<b>Business Details:</b>		
Business Name:	MAXIMUS US SERVICES, INC.	Business ID: 2007060700050
Entity Type:	Domestic For-Profit Corporation	Business Status: Active
Creation Date:	06/06/2007	Inactive Date:
Principal Office Address:	1891 METRO CENTER DRIVE, RESTON, VA, 20190, USA	Expiration Date: Perpetual
Jurisdiction of Formation:	Indiana	Business Entity Report Due Date: 06/30/2023
		Years Due:
<b>Governing Person Information</b>		
Title	Name	Address
Director	ILENE R. BAYLINSON	1891 METRO CENTRE DRIVE, Reston, VA, 20190, USA
President	ILENE R. BAYLINSON	1891 METRO CENTER DRIVE, Reston, VA, 20190, USA
Secretary	DAVID R. FRANCIS	1891 METRO CENTER DRIVE, Reston, VA, 20190, USA
Treasurer	DAVID MUTRYN	1891 METRO CENTER DRIVE, Reston, VA, 20190, USA
Vice President	BRUCE P. PERKINS	1891 METRO CENTER DRIVE, Reston, VA, 20190, USA
<b>Incorporators Information</b>		
Name	Title	Address
DAVID R. FRANCIS	Incorporator	11419 SUNSET HILLS ROAD, RESTON, VA, 20190, USA
<b>Registered Agent Information</b>		
Type:	Business Commercial Registered Agent	
Name:	CORPORATION SERVICE COMPANY	
Address:	135 North Pennsylvania Street, Suite 1610, Indianapolis, IN, 46204, USA	

**Exhibit 4: Maximus Active Registration Status in Indiana.** *Maximus U.S. Services maintains Active status with the Indiana Secretary of State and provides services to the State today.*

### Best Value Partner

Throughout our response we demonstrate our team's passion and readiness to work alongside FSSA, navigating the MLTSS transition together. These transitions are familiar to us. We will combine this experience with our knowledge of Hoosiers to deliver comprehensive, person-centered MSS. We have served Indiana for more than 13 years and we have navigated managed care transitions successfully. We are aware there will be challenges during the transition, and we are prepared to roll up our sleeves and work alongside you to reach the Future State. Our solution remains flexible and will grow alongside the program to support emerging members and FSSA needs.

As the nation's leading provider of high-quality, conflict-free MSS, we are the best choice to provide Hoosiers with culturally sensitive and effective guidance. With our combination of people, technology, and process innovation, Maximus, as the best value respondent, will provide Hoosiers with person-centered MSS and invaluable assistance during the transition to MLTSS. Thank you for considering Maximus for this critical project, and we look forward to building upon our existing relationship with FSSA.

Sincerely,

Tariq Khan

Tariq Khan (May 9, 2023 11:31 EDT)

Tariq Khan  
Senior Director, Contracts