**RFP-24-76492**

**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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* + 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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| Paramount Health Data Project (PHDP) is a non-profit incorporated in the state of Indiana. PHDP provides support to schools and non-profits as through qualitative and quantitative data analyses, site visits and the preparation and delivery of professional development in the areas of mental health, special education and Multi-tiered Systems of Support (MTSS). The mission of the Paramount Health Data Project is to empower schools to address student health and well-being through a whole child approach that includes mental and physical health and their impact on academic success. PHDP works with K-12 schools to implement research-based best practices, as well as to integrate the use of student data that reflects their mental wellness, physical health and academic success into the MTSS process. |

* + 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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| Paramount Health Data Project Executive Staff is all female, with Addie Angelov and Mary Jo Rattermann serving and CEO and Director of Research, respectively. The Board of Directors reflects Paramount Health Data Project’s commitment to diversity. Four members of the nine person board are female, and three Board members 200 are from minority communities. Our commitment to diversity is also reflected in the team of professionals assembled for this project, with Dr. Tamika Zapolski and Angel Ash, both women of color and experts in Diversity, Equity and Inclusion, part of the team designing the Plan of Study and the content for the proposed School Based Mental Health Provider Endorsement. Additionally, Dr. Sharmaine Pechac will be evaluating the work through the lens of diversity, equity and inclusion as the work progresses. |

* + 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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| Attached are PHDP's Balance Sheet and Profit & Loss statements for the years 2021 and 2022.  Although the organization was formed in December 2019, the COVID pandemic prevented our ramping up programming until schools were back in-person. As we have now started programming and are growing, we have engaged a CPA firm (Katz Sapper Miller) that completed our 990 in 2021, are completing our 990 and a financial compilation in 2022 and will complete a full independent audit in 2023. |

* + 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 CEO and Board of Directors, along with their contracted bookkeeping company take responsibility for financials presented. The CEO and the Treasurer of PHDP approve all bills prior to payment. PHDP contracts with an outside bookkeeping company as well as an outside audit firm.  The CEO and Board of Directors review financials at each board meeting.  As a young organization, PHPD has contracted with an outside accounting firm, Katz Sapper Miller (KSM). KSM will complete PHDP's 990 and a financial compilation in 2022, and will make recommendations for preparing PHDP's first independent audit for 2023 financials.  Board members are asked yearly to disclose any conflicts of interest. |

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

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| The contract in Attachment B is acceptable. |

* + 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 | Paramount Schools of Excellence |
| Company Mailing Address | 1203 E. Saint Clair St. |
| Company City, State, Zip | Indianapolis, IN |
| Company Website Address | https://paramountindy.org/ |
| Contact Person | Tommy Reddicks |
| Contact Title | CEO |
| Company Telephone Number | 317-519-4599 |
| Company Fax Number | 463-800-1868 |
| Contact E-mail | treddicks@paramountindy.org |
| Industry of Company | K-8 Education |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | Southeast Neighborhood School of Excellence (SENSE) |
| Company Mailing Address | 1601 Barth Ave |
| Company City, State, Zip | Indianapolis, IN 46203 |
| Company Website Address | www.senseindy.org |
| Contact Person | Dr. Kristie Sweeney |
| Contact Title | Superintendent |
| Company Telephone Number | 317-423-0204 |
| Company Fax Number | 317-631-4401 |
| Contact E-mail | ksweeney@senseindy.org |
| Industry of Company | Education K-8 |
| **Customer 3** |  |
| Legal Name of Company or Governmental Entity | Anthem Blue Cross & Blue Shield |
| Company Mailing Address | 220 Virginia Avenue |
| Company City, State, Zip | Indianapolis, IN 46204 |
| Company Website Address | [www.anthem.com](http://www.anthem.com) |
| Contact Person | Darryl Lockett |
| Contact Title | Health Equity Director |
| Company Telephone Number | (317) 417-2941 |
| Company Fax Number | N/A |
| Contact E-mail | [Darryl.Lockett@anthem.com](mailto:Darryl.Lockett@anthem.com) |
| Industry of Company | Health Insurance/Managed Care |

**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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| Paramount Health Data Project is registered to do business by the Indiana 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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| Tommy Reddicks, President of the Board of Directors, is legally authorized by Paramount Health Data Project to commit the organization contractually. A copy of the PHDP Bylaws can be found in Attachment 2. |

* + 1. **Diversity Subcontractor Agreements**

a. 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.

b. 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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| Paramount Health Data Project will be subcontracting with Coverdale Consulting, a Women’s Business Enterprise, Veteran Strategies, Inc. an Indiana Veteran Owned Small Business Subcontractor, and Diverse Staffing and GreyPrint Consulting, both Minority Business Enterprises. Coverdale Consulting and Veteran Strategies were engaged because of prior relationships with PHDP—Coverdale Consulting has been providing marketing and communications support for PHDP for one year and Robert Vane, Owner and Operator of Veteran Strategies, Inc. has been providing public relations for 3 years. Given the need to start quickly and the relatively compressed timeline of this project and the importance of beginning the work quickly PHDP felt it was important to engage with companies with established relationships. GreyPrint Consulting and Diverse Staffing were found through the MBE/WBE/IVOSB registry hosted by the Indiana Division of Supplier Diversity. Dr. Pechac of GreyPrint was interviewed by Dr. Rattermann prior to engaging her services. Diversity Staffing was asked to submit a quote for clerical and transcription supports. |

* + 1. **Evidence of Financial Responsibility** – Removed at the request of the agency. This section will indicate the ability to provide the mandatory evidence of financial responsibility. See Section 1.25 of RFP for details.

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* + 1. **General Information** - Each Respondent must enter your company’s general information including contact information.

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| **Business Information** |  |
| Legal Name of Company | Paramount Health Data Project |
| Contact Name | Mary Jo Rattermann, Ph.D. |
| Contact Title | Director of Research |
| Contact E-mail Address | [mjr@healthdataproject.org](mailto:mjr@healthdataproject.org) |
| Company Mailing Address | 5601 Crawfordsville Road, Suite 903 |
| Company City, State, Zip | Indianapolis, IN 46224 |
| Company Telephone Number | (317) 361-6772 |
| Company Fax Number | N/A |
| Company Website Address | Healthdataproject.org |
| Federal Tax Identification Number (FTIN) | 84-3988197 |
| Number of Employees (company) | 0 |
| Years of Experience | 10 |
| Number of U.S. Offices | 1 |
| Year Indiana Office Established (if applicable) | N/A |
| Parent Company (if applicable) | N/A |
| Revenues ($MM, previous year) | $385,840.00 |
| Revenues ($MM, 2 years prior) | $127,567.00 |
| % Of Revenue from Indiana customers | 100% |

* 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, as researchers and educators we don’t need a disaster 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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| Paramount Health Data Project follows all HIPAA and FERPA guidelines. State Information will be held on a password protected computer on an encrypted partition of the drive. All data is backed up using SpiderOak Hive, which is a FERPA and HIPAA compliant cloud service that utilizes end to end encryption protocols to ensure the safety of files. |

* + 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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| The Director of Research of Paramount Health Data Project, Mary Jo Rattermann has had extensive experience contracting with the State of Indiana. As owner of Research & Evaluation Resources, LLC, Dr. Rattermann has completed projects for the Indiana Department of Aging and the Division of Mental Health and Addiction, and as a subcontractor with the Pacific Institute for Research and Evaluation (PIRE) for the Indiana Department of Education Project AWARE. For the Department of Aging, Dr. Rattermann completed a comprehensive review of residential homes potentially in violation of the requirements for the Residential Care Assistance Program (RCAP). This review included site visits and analysis of electronic medical records. Dr. Rattermann has also performed an environmental scan of the current state of mental health providers, focusing on the pipeline from education to employment of mental health professionals in Indiana, as well surveying and interviewing mental health professionals across the state regarding their views on mental health in schools, a review of best-practices for mental health in schools, and a provider database of mental health professionals in Indiana. Finally, Dr. Rattermann has served as the local evaluator for all three Project AWARE grants and has performed site visits, focus groups, interviews and data analyses in support of that program.  Paramount Health Data Project has been contracted by 4 school systems to provide professional development training for special education paraprofessionals as part of the Indiana Department of Education Office of Special Education Paraprofessional Training grant. PHDP is designing materials to train special education paraprofessionals to be able to take on more responsibility for the educational programs of students with special needs. |

* + 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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| The principal officers of Paramount Health Data Project, Mary Jo Rattermann and Addie Angelov, both have experience serving customers of similar size. As noted above, Dr. Rattermann has had several state contracts. She has additionally had experience working with the Christel DeHaan Foundation to perform large scale data analysis, and Fairbanks Hospital to analyze patient mental health data. Dr. Rattermann is also part of the Indiana Grand Challenge project examining the stigma associated with Medically Assisted Treatment for substance use disorders. The Grand Challenge is a multi-year and multi-site mixed methods research project that includes Fairbanks Hospital as one if the research sites.  Dr. Angelov was Director of Research for the Indiana Department of Education, and during her time in that position wrote the application for the Quality Counts federal grant for 60 million dollars, which at that time was the largest federal grant ever awarded to the IDOE. Dr. Angelov has also been contracted by Gary Community School Corporation, Wayne Township schools and the School System of New Orleans to revise or redesign their special education practices. Dr. Angelov has also designed and implemented programs for Project Lead the Way, the Woodrow Wilson Foundation and the University of Indianapolis. |

* + 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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| Paramount Health Data Project is a Buy Indiana business. A screen shot of the confirming email can be found in Attachment 3. |

* + 1. **Payment -** Please provide the requested information in RFP Section 2.3.15.

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| REMOVED AT REQUEST OF AGENCY |

* + 1. **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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Attachment 1

PHDP Profit and Loss Sheets 



Attachment 2: PHDP By-laws

Attachment 3: Buy Indiana certification

A close-up of a email

Description automatically generated