

**RFP# 25-80064 BUSINESS PROPOSAL
ATTACHMENT E**

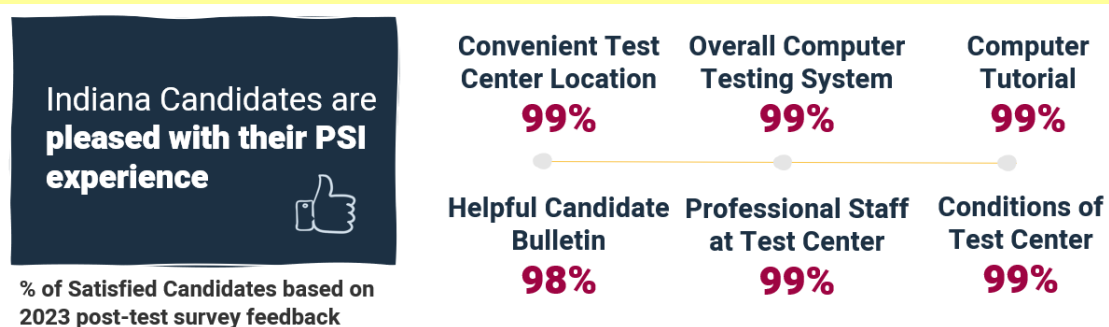
Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.

Business Proposal

2.3.1 General - 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.

PSI Services is proud to have been a partner of the Indiana Cosmetology and Barbers Board since 2015. Our team that works with the Board is composed of specialists who have deep experience with your programs and with similar cosmetology and barbering programs across the country. They are experts in the industry and on your exams and rules. Each of the project team members presented in this proposal is accessible to State staff and will be responsive and flexible in meeting your needs. Cathy Laitinen, your account manager, has extensive experience with the program and will be your main point of contact.

Because of our history with the Board and our established in-state resources and staff, we are exceptionally qualified to serve you under this contract and fully committed to meeting your needs. We plan to give you the attentive, customized service you deserve – avoiding the need to switch providers and disrupt your candidates.



Our deep understanding of cosmetology and barbering comes from being the national leader in Cosmetology licensing – **20 state agencies currently trust PSI to be their Cosmetology and Barber testing partner**, more than any other vendor can claim. We have been providing these exams for 29 years, and have delivered more than 190,000 over the last 12 months.

At PSI, we believe that the key to effective testing lies in a deep understanding of the professions we support. Our team has meticulously developed a suite of exams that are aligned with Indiana's laws, rules, and regulations and reflect the highest industry standards. We also recognize that each candidate comes with unique needs, which is why the exams will be available in multiple languages – including Chinese, Simplified Chinese, Spanish, and Vietnamese. This ensures that every aspiring professional, regardless of their background, has a fair chance to succeed.

Why PSI?

- **Unmatched Experience:** We have a proven track record of delivering high-stakes examination services across the country, and to agencies in 47 states. Our extensive experience in developing, administering, and scoring licensure exams ensures we are prepared to handle the unique demands of Indiana's diverse professional community.
- **Accessibility and Convenience:** We guarantee that candidates will have convenient access to our services – our network of test centers includes 22 that currently serve your candidates in Indiana, with another 84 in reserve across the state if needed. There are also 48 additional sites in neighboring states. Our registration system is user-friendly, allowing candidates to schedule their exams with ease. They also receive their results promptly after an exam. It's worth noting that according to 2023 post-exam surveys, **99% of the State Board of Cosmetology and Barber Examiner candidates are satisfied with their testing experiences, and 99% are satisfied with their testing locations.**
- **Security and Compliance:** We take security very seriously, so our exams are delivered through a secure, computer-based platform that ensures the integrity of the testing process. We comply fully with the Americans with Disabilities Act (ADA) and all other relevant regulations, ensuring that every candidate has a safe, equitable testing experience. If the Agency chooses to expand test availability at some point through online remote proctored exams, our patented secure browser with a lockdown feature provides superior security because no content is transferable to the candidate's computer, and no outside applications or windows can be open.
- **Commitment to Indiana's Values:** We are deeply committed to supporting the State of Indiana's initiatives for diversity, equity, and inclusion. Our proposal includes a strong plan to engage with minority-, woman-, and veteran-owned businesses.

2.3.2 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.



PSI Services LLC was founded in 1946 and was incorporated in the State of Delaware. The certificate of authority is provided as **Appendix 1**. An organization chart is provided as **Appendix 2**.

Since 1988, our services have included the development and delivery of licensing exams, and we have emerged as a leader in this industry – servicing over 180 contracts in 47 states, with consistent growth in the licensing market. Over those 36 years PSI has worked with licensure agencies around the country to provide the test development, exam administration, continuing education, and pre-licensing services required by this RFP.

We provide high-stakes testing to over 900 clients, including state licensing, certification, higher education, and federal exam programs.

In January 2024, PSI announced an acquisition by ETS, a highly respected, not-for-profit organization that develops, administers, and scores tens of millions of tests annually – including TOEFL®, TOEIC®, the GRE® test, and the Praxis Series.®

Our merger announcement with ETS was finalized in January 2024. PSI and ETS have long been on parallel tracks, and the acquisition presents a unique set of complementary services to the testing industry, allowing our clients the opportunity to benefit from a wider range of resources and expertise. This new home for PSI provides scale and financial security over the long term, allowing us to continue to invest in all aspects of our services to your benefit.

	+		=	The leader in measuring human progress from education to workplace.
Market leaders in test development and delivery across workforce certification and licensure.		The world's largest private educational testing and measurement organization.		

What does this mean for our clients?

- ☑ Stability – Scale and financial security over the long term
- ☑ Even stronger portfolio of services and opportunity to expand offerings to our clients
- ☑ Access to research and technology teams to explore cutting-edge advancements in assessment, security, and exam design
- ☑ Coming in 2025 – Enhanced Security Integrations in testing platforms as well as upgrades to our entire Test Center Network

We intend to retain the culture, leadership, and client teams that have been crucial to our past success – it is important to note that the delivery of your program and the team with which you work will not change on account of our new ownership.

2.3.3 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 composition of Respondents’ Executive Staff and Board Members, if applicable.

At PSI, we are committed to removing systemic bias and inequity – and we demonstrate that commitment through our programs, practices, policies, and protocols. Our global Diversity, Equity, and Inclusion (DE&I) Team is committed to cultivating a culture of inclusion through education, awareness, communication, and allyship. We focus on tangible practices and developable behaviors that can be implemented and used to foster a culturally agile and psychologically safe work environment.

PSI believes addressing DE&I in the workplace is far more important than a single assessment, seminar, or series of events. Inclusion must be interwoven into the fabric of all talent management programs and throughout the employee life cycle. Embracing diversity is a core value we strive to bring to life every day.

We recognize that diversity and inclusion are not only the right thing to do – they also have a quantifiable impact on us and our clients, including measurable increases in customer satisfaction, productivity, profitability, and decreased employee turnover. To that end, our approach focuses on both processes and people. We believe this is the only way to be truly effective in removing systemic bias from all programs, practices, policies, and protocols.

Key PSI DE&I initiatives

- A Center of Excellence that reviews research and best practices to support our products, guide our DE&I programs and initiatives, and determine appropriate metrics for measuring success. Members represent multiple countries from around the globe and various disciplines and backgrounds, including senior leadership, Human Capital, research and development, and Consulting. The Center meets weekly.
- Incorporation of voices from all company sectors in regular open discussions and panels on DE&I topics. Feedback from these sessions is used to develop DE&I strategy.
- Embedding the embrace of diversity into job-related selection techniques and as a performance indicator in our management programs.
- Development of a mentoring program designed to increase diversity and inclusion and to help employees overcome barriers they might experience at work. Mentoring is also intended to help employees create new relationships and build deeper networks within the organization.
- Development of an Elevate program, aimed at growing and developing female leaders across the organization. This focuses on topics such as personal brand, stereotype threats, and creating a personal board of directors.
- As a company we provide employees the opportunity to participate in a paid “Volunteer Day” to allow them more time to engage with a charity in their community.

Five core principles underpin our approach to supporting these efforts:

- **Global Perspective:** Thinking about cultural nuances all around the world.
- **Personal Insight:** Providing individuals with personalized information about underlying characteristics that lead to inclusive behaviors.
- **Integrated Approach:** Taking a holistic, integrated approach to building an inclusive culture that starts at the top.
- **Role Modeling:** Using allyship as a framework for inclusive leadership development and behavior modeling across the organization to effect change.
- **Accountability:** Showing commitment to action by setting goals and measuring progress.

Executive and Board Demographics

The PSI Executive Team and Board Members support DE&I efforts and actively participate in inclusion initiatives.

Below, we have provided the demographic information for these company leaders.

Executive/Board Demographics	
Gender	36% Female 64% Male
White	68%
Asian	18%
Black or African American	9%
Hispanic/Latino	5%

As part of our commitment to diversity and inclusion in our workforce, and in line with our work with Federal government clients, PSI has practices and policies in place to ensure compliance with laws and regulations for nondiscrimination. A major component is promoting equal employment opportunities.

As part of this commitment, PSI has partnered with DirectEmployers, a leader in OFCCP compliance solutions, to expand the reach of our job listings. All PSI job opportunities are published to hundreds of college job networks and on specialized Diversity job boards (e.g., Disability, Military/Veteran, Race, Gender). This partnership gives us a proactive way to search resumes, contact potential job applicants, and develop relationships with agencies that embrace the Diversity, Equity, and Inclusion values at the heart of our recruitment strategy.

2.3.4 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 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 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.**

We have provided independently audited, consolidated financial statements (**Appendix 3**) for the past two years, demonstrating the stability and financial strength of our new parent company, ETS. As we are a privately held firm, these documents are not public information, contain sensitive financial data, and should be treated as confidential and exempt from public disclosure under IN Code § 5-14-3-4 (2023). The financial statements have been labeled *confidential*. They are omitted from the redacted version of the proposal.

We were acquired by ETS in January of 2024. ETS is a highly respected, not-for-profit organization that develops, administers, and scores tens of millions of tests annually, including the GRE®, Praxis®, TOEFL®, and TOEIC®.

PSI and ETS have long been on parallel tracks, and our merging presents a unique set of complementary services to the testing industry, allowing our clients to benefit from a wider range of resources.

This new home for PSI provides scale and financial security over the long term, allowing us to continue investing in all aspects of our services to benefit our licensure clients. We will retain the culture, leadership, and client teams that have been crucial to our past success. The delivery of your program will not change, nor will the team with which you work on account of our new ownership.

While we operate as our own for-profit organization, we are also backed by ETS, which maintains a secure financial standing supported by \$1.532 billion in net assets. For the two years that ended on September 30, 2023, their audited operating revenues, increase in operating net assets, and ending net assets were \$1.025 billion, \$8.4 million, and \$1.495 billion, respectively. For the first quarter ending December 31, 2023, ETS's unaudited operating revenues, increase in operating net assets, and ending net assets were \$253.5 million, \$38.2 million, and \$1.532 billion respectively.

PSI itself has grown on average 5% from 2018 through 2023, demonstrating our own financial stability.

2.3.5 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).

The CEO and CFO take personal responsibility for the thoroughness and correctness of any and all financial information supplied with this proposal.

PSI also adheres to an effective internal reporting and financial control process. It has and monitors a conflict of interest policy relating to transactions between the company and its officers and directors, including limitations on such transactions. It also has and polices a code of business conduct and ethics. Our financial statements are independently audited.

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

PSI has reviewed and understands the mandatory and non-mandatory contract clauses listed in section 2.3.6. We acknowledge the mandatory clauses are non-negotiable and agree to their inclusion in the contract. As instructed, we have indicated this in Attachment J.

We propose the following alternative wording under part 36. Ownership of Documents and Materials: A. All documents, records, programs, applications, data, algorithms, film, tape, articles, memoranda, and other materials (the "Materials") not developed or licensed by the Contractor prior to execution of this Contract, but specifically developed **solely and exclusively for the State** under this Contract shall be considered "work for hire" and the Contractor hereby transfers and assigns any ownership claims to the State so that all Materials will be the property of the State. If ownership interest in the Materials cannot be assigned to the State, the Contractor grants the State a non-exclusive, non-cancelable, perpetual, worldwide royalty-free license to use the Materials and to use, modify, copy and create derivative works of the Materials.

2.3.7 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. **Attachment H** should be submitted the same day of the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

Customer 1	
Legal Name of Company or Governmental Entity	California Board of Barbering & Cosmetology
Company Mailing Address	2420 Del Paso Road
Company City, State, Zip	Sacramento, CA 95834
Company Website Address	https://www.barbercosmo.ca.gov/
Contact Person	Kristy Underwood
Contact Title	Executive Officer
Company Telephone Number	(916) 575-7100
Company Fax Number	(916) 575-7281
Contact E-mail	Kristy.underwood@dca.ca.gov
Industry of Company	State Licensing Agency
Customer 2	
Legal Name of Company or Governmental Entity	Virginia Department of Professional and Occupational Regulation
Company Mailing Address	9960 Mayland Drive, Suite 400
Company City, State, Zip	Richmond, VA 23233
Company Website Address	https://www.dpor.virginia.gov
Contact Person	Gregory Emerson
Contact Title	Director of Examinations
Company Telephone Number	(804) 367-8570
Company Fax Number	(866) 254-0312
Contact E-mail	gregory.emerson@dpor.virginia.gov
Industry of Company	State Licensing Agency

Customer 3	
Legal Name of Company or Governmental Entity	Texas Department of Licensing and Regulation
Company Mailing Address	920 Colorado Street
Company City, State, Zip	Austin, TX 78701
Company Website Address	https://www.tdlr.texas.gov/
Contact Person	Ray Pizzaro
Contact Title	Director
Company Telephone Number	(512) 767-6810
Company Fax Number	(512) 475-2871
Contact E-mail	Ray.pizzaro@tdlr.texas.gov
Industry of Company	State Licensing Agency

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.

PSI is currently registered and in good standing with the Secretary of State. Our registration number is 2000040300100. We are a registered vendor with the IDOA.

2.3.9 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.

We confirm that Alon Schwartz is authorized by the organization to commit PSI contractually. A copy of the Authorizing Document is available in **Appendix 4**.

2.3.10 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.

In support of the State's initiatives for diversity, equity, and inclusion, we use Minority & Women's Business Enterprises and a Veteran-Owned Small Business Subcontractor at levels that **exceed each of your goals for this contract.**

We are committing to the following:

- **12%** of annual test revenue to Cabello Associates of Indianapolis, a certified Woman-Owned Business Enterprise (WBE), to provide translation of the Board's examinations into all required languages.
- **9%** of annual test revenue to HIELO Services LLC of Hobart, dba Latin Media, a certified Minority-Owned Business Enterprise (MBE), for quality assurance of the Board's translated examinations.
- **4%** of annual test revenue to All American Express Solutions of Indianapolis, a certified Veteran-Owned Business (IVOSB), to provide office supplies on an ongoing basis.

Each of these businesses is on the State of Indiana Certified M/W/IVOSB list. Further details and documentation are provided in **Attachment A: Minority and Women Subcontractor Commitment Form** and **Attachment A1: Indiana Veteran and Small Business Contractor Form.**

2.3.11 Evidence of Financial Responsibility – Removed at the request of the agency.

2.3.12 General Information - Each Respondent must enter your company's general information including contact information.

Business Information	
Legal Name of Company	PSI Services LLC
Contact Name	Alon Schwartz
Contact Title	Chief Revenue Officer
Contact E-mail Address	aschwartz@psionline.com
Company Mailing Address	18000 West 105th Street
Company City, State, Zip	Olathe, KS 65061
Company Telephone Number	(800) 367-1565
Company Fax Number	913-895-4650
Company Website Address	www.psionline.com
Federal Tax Identification Number (FTIN)	20-5910717
Number of Employees (company)	1500
Years of Experience	78
Number of U.S. Offices	2 PSI Offices, 4 ETS Offices
Year Indiana Office Established (if applicable)	1999
Parent Company (if applicable)	ETS
Revenues (\$MM, previous year)	1.025 billion
Revenues (\$MM, 2 years prior)	1.067 billion
% Of Revenue from Indiana customers	0.5%

- a. 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.

Yes. We have provided our Disaster Recovery Plan/Business Continuity Plan in Appendix 5.

b. What is your company's technology and process for securing any State information that is maintained within your company?

PSI highly values security for the Department and its test takers. Because of this, we've adopted several security measures for all data we receive.

This includes being ISO 27001 accredited, with SOC 2 certification, meeting PCI compliance, a SSAE16 certification, and undergoing regular SOC testing. The test taker user image and photo ID are encrypted on the user's computer using the US government-adopted standard, AES (Advanced Encryption Standard), as specified in FIPS PUB 197. The data are uploaded using the secure HTTP protocol (HTTPS) and housed in an Amazon data facility that has passed a SAS70 Type II audit (content and physical access security audit).

We understand that we must complete a security audit every 12 months with results available to the Board.

Our established systems ensure the security and confidentiality of all test materials. The item banking software stores all information on a network behind a secure firewall, thus increasing security. An access code is required to gain entry to the item bank, and access is allowed only to those directly responsible for maintaining it. Our secure network records all access to the system, and individual item modifications are marked with the date and the identity of the user making the change.

In addition to the encryption, security is taken to another level as the "metadata" regarding any exam (username and exam identifier) are stored in a separate data facility from where actual exam data is stored, creating an environment that would require a "hacker" to break into two physically separated hosting facilities to tie actual user records (metadata) to the photo records and video data. Test taker information is not stored on servers at our test centers, so there is no risk of data being accessed at a test site.

All information assets used within the service are documented, adhering to the asset management requirements in our security policy. This includes all Personally Identifiable Information (PII) – including all information assets, the retention periods, the destruction process, and evidence of secure disposal. Candidate data is anonymized in our database by removing all identifiers.

Our physical data center infrastructure primarily uses cloud-based data centers, which must meet the requirements of the Fortune 100, government agencies, and other security-conscious organizations within our client base. Our security measures exceed most of those used in the testing industry. We have a security officer who oversees our compliance with requirements for test security and the privacy of information across the organization and for all clients. PSI understands that your exams are classified as confidential, and we will continue to adhere to your privacy policies.

IT assets being decommissioned follow a secure destruction/wipe process for electronic media, taking into account NCSC requirements such as Secure Sanitization of Media. A third party is used that holds credentials for securely disposing of media and provides a certificate. This follows the NCSC Assured Service (Sanitization) plan (CAS-S), CPNI, or ADISA. Certificates for disposed assets are stored securely.

Secure Platform Access

PSI has strict access control procedures to limit who, how, and what is being processed. All data is protected and encrypted in transit and at rest and complies with industry standards and applicable laws. Applications run on a secure server with HTTPS and have strong authentication measures in line with our Password Policy, including complex password rules. Access is only allocated to individuals whose roles require it, based on least privilege and need-to-know principles. Privileged access rights, such as those associated with administrative accounts, are identified and tightly controlled.

PSI's Network Security

PSI adheres to industry security standards and provides access to systems strictly through end-to-end encryption. The PSI web services system, which provides both user and web services (API), can only be accessed using industry-standard HTTPS encryption. We also have active IPS, an external firewall, an internal system firewall, and several layers of authentication implemented at the web server level, as well as an application server with integrated encrypted database authentication and access.

Our network infrastructure operates within the borders of a sophisticated commercial packet-filtering firewall system provided by Cisco Systems. All incoming and outgoing IP traffic is logged and monitored to ensure that network security breaches are prevented at the perimeter and network personnel are alerted to attempts at unauthorized network access.

External connections to our network are permitted only through our firewall. Services that are accessed via the network are also hosted and separated from our internal network via a secondary firewall. PSI utilizes Rapid 7 SIEM to provide real-time visibility and incident detection across network, endpoint, and cloud services.

2.3.13 Experience Serving State Governments - Please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

PSI was founded in 1946 and has 78 years of experience in testing and psychometric services. As one of the largest assessment providers in the world, we deliver millions of exams and assessments annually. We are a leading test developer and the publisher of over 2,000 credentialing and licensing exams for Federal and state licensing, certification, and higher education programs.

Since 1988, our services have included the development and delivery of licensing exams, and we have emerged as a leader in this industry — servicing over 180 contracts in 47 states, with consistent growth in the licensing market. In those 36 years, PSI has worked with licensure agencies around the country to provide the licensing, exam development, and test administration services required by this RFP. Overall, we provide high-stakes testing to over 900 clients including state licensing, certification, higher education, and federal exam programs.

We have almost 130 contracts for construction and trades, cosmetology, insurance, and real estate testing. With these contracts, **we serve more state government cosmetology and real estate agencies than any other company.** Our HiSET exam, which enables youths and adult learners to demonstrate their college- and career-readiness, has been adopted by 30 states. Our experience with state cosmetology and barbering agencies is detailed in **2.3.14 Experience Serving Similar Clients.**

We also have more than 30 years of experience in operating federal government testing programs for such agencies as the U.S. Customs and Border Protection, Transportation Security Administration, Federal Bureau of Investigation, U.S. Postal Service, and U.S. Immigration and Customs Enforcement.

Test Development Experience

We are at the forefront of test development services in the industry, providing a full range of test development and psychometric services, including job analysis, test design, item writing, standard setting, equating, and statistical analyses for quality control and test security. We have also conducted countless job analysis studies, market research, and examination development for hundreds of credentialing and licensure exams. Over the last year, we conducted more than 50 job analysis studies for credentialing clients, including a new national Cosmetology job analysis with participation by 3,100 subject matter experts.

We employ an in-house test development team of over 40 doctoral- and masters-level psychometricians and test development professionals with extensive experience in developing valid, reliable, job-related, legally defensible examinations. Our psychometricians are recognized leaders and active participants in the assessment industry at conferences and they publish respected books and articles. The psychometrics and test development team is led by Dr. Isabelle Gonthier, our Chief Assessment Officer, who has over 20 years of experience and has led teams of over 90 assessment, psychometric, and test development professionals in the design, development, and evaluation of assessments in a multitude of fields.

The psychometricians and test development specialists assigned to your project team are experienced in cosmetology licensing and work on programs similar to those we administer for the Board.

Test Administration Experience

PSI administers exams for over 400 certification programs and **delivers over 28 million exams annually**. Our test delivery client base is vast and varied, including fields such as healthcare, finance, IT, environmental trades, building trades, and many others. **Almost 500 clients** (in the divisions of Licensure, Certification, IT, and Federal) **utilize PSI's worldwide testing locations for exam delivery**.

Each PSI test center is carefully selected and staffed with test administrators trained for high-stakes testing to ensure that each candidate is tested in a standardized, secure environment. Our test centers are selected to meet strict security and administration standards.

Cosmetology and Barbering Experience

We are the national leader in Cosmetology licensing – **20 state agencies** currently trust PSI to be their Cosmetology and Barber testing vendor, more than any other vendor can claim. **We have been providing these exams for 29 years**, and we **delivered more than 190,000 over the last 12 months**.

We have more experience than any other vendor in providing all the required services to State Barbering and Cosmetology licensing agencies: verification of examination eligibility, registration and scheduling, scoring, reporting, security, and customer service.

2.3.14 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.

The Cosmetology and Barbering Clients that we serve across the country have a similar scope of services to those we provide for the State's Board. No other company has as much experience as PSI in providing the services required by this RFP, both for the Board itself and for similar agencies across the country – including states with population levels similar to Indiana's. For detailed examples of our work in the industry, please see the references that are called out after the list below.

We have specialized teams of highly experienced Cosmetology professionals: a test development team, an account management team, and a customer service team. All are highly experienced in serving Cosmetology agencies and candidates.

Our experiences working with all the Cosmetology and Barbering clients below help us to address questions and issues as they arise, and share new opportunities related to testing developments and challenges around the country.

Client Name	Services Provided	Service Dates	Annual Exams
Alabama Board of Cosmetology	Test development, test administration, scoring, reporting, security, customer service	2023 – Present	3,000
California Board of Barbering and Cosmetology	Test Development, test administration, scoring, reporting, security, customer service	2004 – Present	43,000

Colorado Office of Barber and Cosmetology Licensure	Verification of exam eligibility, test development, test administration, scoring, reporting, security, customer service	2013 – Present	10,500
District of Columbia Board of Barber and Cosmetology	Test administration, scoring, reporting, security, customer service	2017 – Present	1,700
Georgia State Board of Cosmetology and Barbers	Test administration, scoring, reporting, security, customer service	2011 – Present	1,050 (Barber) 14,100 (Cosm.)
Illinois Department of Financial & Professional Regulation	Test administration, scoring, reporting, security, customer service	2011 – Present	6,500
Indiana State Board of Cosmetology	Verification of examination eligibility, registration and scheduling, test development, test administration at test centers, scoring, reporting, security, customer service	2015 – Present	6,080
Kentucky State Board of Hairdressers & Cosmetologists	Test development, test administration, scoring, reporting, security, customer service	2023 – Present	2,000
Maryland Board of Barbers and Cosmetologists	Verification of exam eligibility, test development, test administration, scoring, reporting, security, customer service	2015 – Present	8,675
Massachusetts Board of Registration of Cosmetology and Barbering	Verification of exam eligibility, test development, test administration, scoring, reporting, security, customer service	2022 – Present	7,450
Michigan Board of Cosmetology	Verification of exam eligibility, test development, test administration, scoring, reporting, security, customer service	2005 – Present	10,400

Minnesota Board of Cosmetologist Examiners	Test development, test administration, scoring, reporting, security, customer service	2014 – Present	16,350
New Mexico Barbers & Cosmetologists Board	Test administration, scoring, reporting, security, customer service	2011 – Present	1,730
Nebraska Department of Health and Human Services	Test administration, scoring, reporting, security, customer service	2015 – Present	900
Rhode Island Department of Health	Test administration, scoring, reporting, security, customer service	2015 – Present	700
South Carolina Board of Cosmetology	Test administration, scoring, reporting, security, customer service	2020 – Present	10,030
South Carolina Board of Barbering	Test administration, scoring, reporting, security, customer service	2020 – Present	1,125
Tennessee State Board of Cosmetology	Test development, test administration, scoring, reporting, security, customer service	2005 – Present	12,400
Tennessee Barber Examiners Board	Test development, test administration, scoring, reporting, security, customer service	2005 – Present	1,550
Texas Department of Licensing and Regulation, Barbering and Cosmetology	Test development, test administration, scoring, reporting, security, customer service	2004 – Present	76,100
Virgin Islands Department of Licensing and Consumer Affairs	Test administration, scoring, reporting, security, customer service	2012 – Present	100

Virginia Board for Barbers and Cosmetology	Verification of exam eligibility, test administration, scoring, reporting, security, customer service	2020 –Present	12,400
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A few of our best examples of contracts similar in size and scope to the Board’s are the ones we used for references. These are summarized on the following pages (these clients have submitted the required Reference Forms to the State).

California Board of Barbering & Cosmetology

PSI and the California Department of Consumer Affairs (DCA) have partnered since 2007. Under this contract, PSI provides test administration services for several regulatory agencies, including the Board of Barbering and Cosmetology. We administer the six types of the PSI National Cosmetology Exam in English, Simplified Chinese, Spanish, Vietnamese, and Korean to more than 40,000 candidates annually.

DCA also receives immediate scoring and regular reporting of test and demographic data via email and through the Client Portal. Candidates have 24/7 access to our scheduling site, where they can access their Candidate Information Bulletin, locate the nearest test center via Google Maps, and contact customer support. In a recently conducted survey, 99% of candidates were satisfied with the program.

Contact: Kristy Underwood, Executive Officer | (916) 575-7100
kristy.underwood@dca.ca.gov

Virginia Department of Professional and Occupational Regulation

The Virginia Department of Professional and Occupational Regulation (DPOR) has partnered with PSI since 2000 to provide testing services to several of its programs. Since then, we have delivered over 355,000 exams to their candidates, averaging 20,000 annually. PSI has developed over 50 exams for this program and provides the DPOR with annual exam item bank analysis reports summarizing the performance of each exam item. We deliver these exams at 14 Virginia test center locations, including at correctional facilities where we administer paper-based exams.

Before a test taker can schedule their exam, PSI processes their applications and verifies their eligibility on behalf of the DPOR. At test centers, PSI collects candidates' fingerprints using a Live Scan process, compatible with the FBI's standards. To expand on our existing test center security, PSI also implemented a customized approach to "scratch-paper" by using erasable whiteboards at each test center. Test takers for this program can schedule online through a DPOR-branded website or through a dedicated toll-free number to connect with customer representatives who know their program.

Contact: Gregory Emerson, Director of Examinations | (804) 367-8570
gregory.emerson@dpor.virginia.gov

Texas Department of Licensing and Regulation

The Texas Department of Licensing and Regulation (TDLR) earns the trust of Texans by providing innovative solutions for licensees and those they serve. TDLR issues business and occupational licenses, certificates, permits, and registrations for 40 programs in the State. PSI has provided testing services to TDLR for more than 16 years via 30 test centers and eight practical test sites. We have also aided in developing over 142 exams for various licensed professions in multiple languages.

We have served the Department for 20 years, providing:

- Test Administration (since 2004)
- Test Development (since 2005)
- Test Development and Administration for Barber and Cosmetology (since 2006)

In 2009, all three services were consolidated, and new exam categories were added. In both 2015 and 2018, TDLR again chose us to provide these services through a competitive bidding process due to our extensive Texas experience and the expertise of our staff.

We manage all aspects of TDLR's examination program online and through a dedicated telephone line, including registration and fee collection. PSI has administered over 300,000 candidates over the contract's life. We deliver a number of TDLR exams – including the cosmetology exam – in Spanish, Chinese, Korean, and Vietnamese.

For reporting, TDLR has access to test data and reporting via our Client Portal, and we run ad hoc reports as needed. We also offer candidates a dedicated toll-free phone line, email, and chat as available communication options.

Contact: Ray Pizzaro, Director | (512) 767-6810 | ray.pizzaro@tdlr.texas.gov

2.3.15 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.

We do not claim eligibility for Buy Indiana points.

2.3.16 Reserved

2.3.17 Reserved

2.3.18 Additional Terms and Conditions related to Cloud-based systems the State expects to execute with the successful Respondent(s) are provided in Attachments B1, B2, and B3, respectively Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS) and Software-as-a-Service (SaaS). Depending on your proposed System, you could be required to agree to one or more of the Additional Terms and Conditions. It is the State's strong desire not to deviate from the Additional Terms and Conditions that are provided in these attachments and as such the State reserves the right to reject all requested changes. Any or all portions of this RFP and any or all portions of your response may be incorporated as part of the final contract. Please indicate in your response below which of these sets of Additional Terms and Conditions you believe applies to your proposed System. Review these Additional Terms and Conditions and indicate acceptance and/or any redlined edits, via Track Changes

PSI adheres to Attachment B3 – IOT Additional Terms and Conditions – Software as a Service Engagements. We do not, however, currently host our solution in a FedRAMP Authorized data center as mentioned in the Policies to Vendors, and request an exception to that requirement. Our process for FedRAMP authorization is underway.

PSI Services

APPENDICES

1. Certificate of Authority
2. Organizational Chart
3. Financial Statements (REDACTED)
4. Certificate of Authorization



APPENDIX 1

Certificate of Authority



Delaware

PAGE 1

The First State

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "PSI SERVICES LLC" IS DULY FORMED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE FOURTH DAY OF DECEMBER, A.D. 2012.

AND I DO HEREBY FURTHER CERTIFY THAT THE SAID "PSI SERVICES LLC" WAS FORMED ON THE TWENTY-SIXTH DAY OF OCTOBER, A.D. 2006.


AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL TAXES HAVE BEEN PAID TO DATE.

4241594 8300

121292540



You may verify this certificate online
at corp.delaware.gov/authver.shtml


Jeffrey W. Bullock, Secretary of State
AUTHENTICATION: 0032664

DATE: 12-04-12

APPENDIX 2

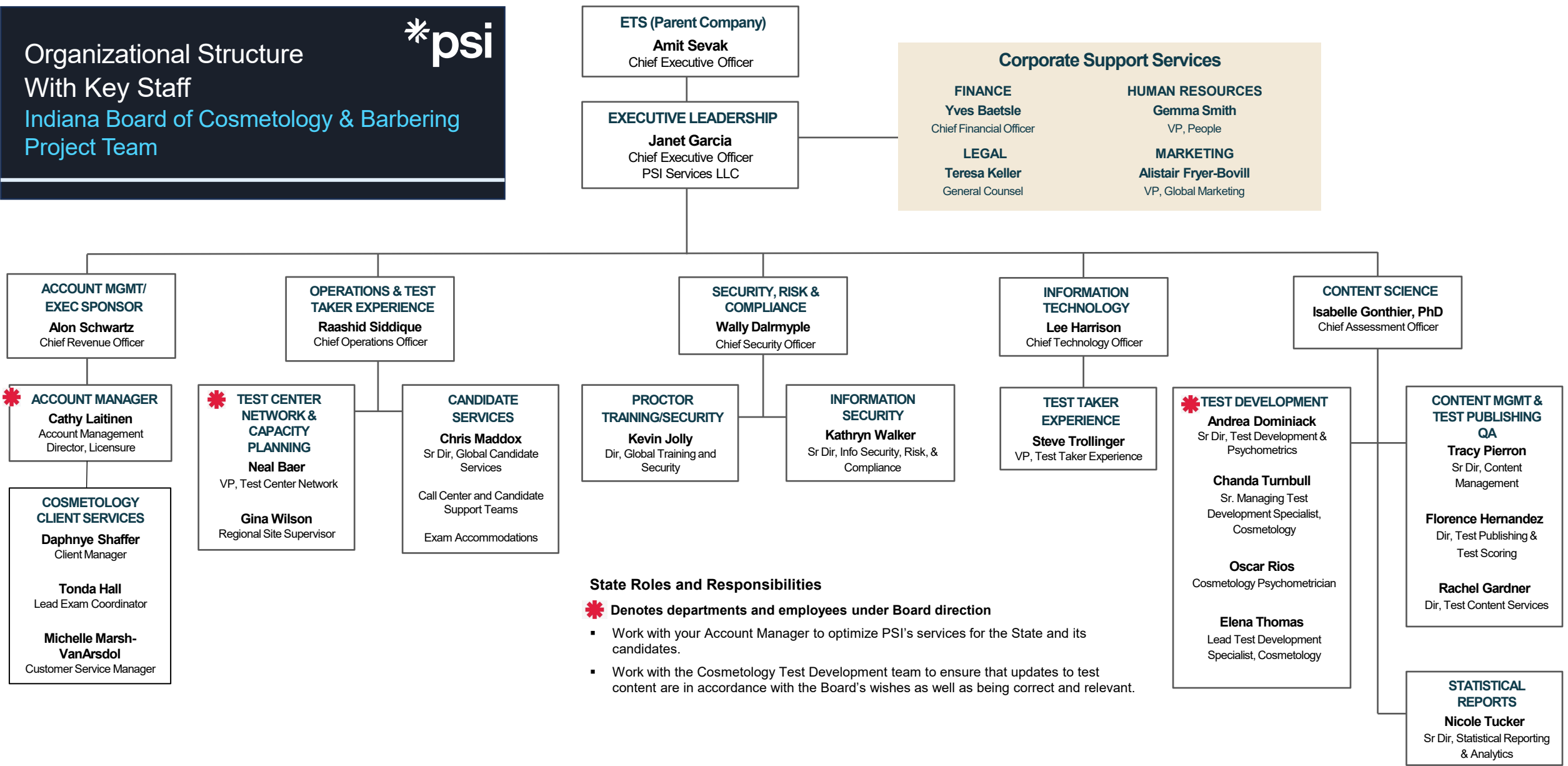
Organizational Chart




Organizational Structure

With Key Staff

Indiana Board of Cosmetology & Barbering Project Team



State Roles and Responsibilities

-  Denotes departments and employees under Board direction
 - Work with your Account Manager to optimize PSI's services for the State and its candidates.
 - Work with the Cosmetology Test Development team to ensure that updates to test content are in accordance with the Board's wishes as well as being correct and relevant.

APPENDIX 3

Financial Statements - REDACTED



APPENDIX 4

Authorizing Document



CERTIFICATE OF AUTHORIZATION

I, Janet Garcia, as Chief Executive Officer of PSI Services LLC, a limited liability company ("Company"), do hereby certify that I have authority to act as an agent of the Company in executing this Certificate of Authorization. I further certify the following individual has the authority to prepare, execute, deliver and perform, and commit the Company as the case may be, to such agreements, amendments, applications, approvals, certificates, communications, consents, demands, directions, documents, further assurances, instruments, notices, orders, requests, resolutions, supplements or undertakings:

Alon Schwartz, Chief Revenue Officer

Further, I certify that the company has given all necessary approvals for the execution of said documentation.

IN WITNESS WHEREOF, I have set my hand this 28th day of August 2024.

DocuSigned by:

Janet Garcia

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Janet Garcia, Chief Executive Officer