

**RFS 22-67778 BUSINESS PROPOSAL
ATTACHMENT C**

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 RFS.

Inspire Case Management Inc strives to be part of a world without barriers, where everyone has the opportunity and rights to make choices. To recognize and give our participants the tools and resources to successfully navigate each transition in life, including building social connections and independence: employment preparation, training, and experience; and fun and engaging activities that offer families an opportunity to refresh and recharge. Inspire Case Management Inc will work in a team approach to improve an individual's quality of life and help them live their best life.

Inspire Case Managers are dedicated to being an advocate and fundamental resource to creating the most independent life for the individuals we serve. Inspire Case Management will provide quality case management to the Medicaid waiver for the Family Support and Community Integration waiver. Inspire Case Management will provide advocacy, annual planning, continued level of support, and a strong resource for individuals served. Inspire Case Management will strive to uphold the highest ethical standards of case management practice, address legislative and regulatory issues as they pertain to the effective and efficient delivery of quality services, to maintain the integrity of Case Management values in the implementation of new funding sources, through offering guidance to administrators and government agencies in the formulation of standards and practices, and to enhance and reinforce the practice of Case Management services which are based on a common perspective, functions skills and knowledge base. Inspire will provide these quality services through the use of Life Course Framework key principles of Focusing on All People, Recognizing the Person Within the Context of Their Family, Trajectory of Life Experiences Across the Lifespan, Achieving Life Outcomes, Holistic Focus Across Life Domains, Supporting the Three Buckets of Need, Integrated Services and Supports Across the Life Course, and Transformational Policy and Systems Change.

- 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.

Inspire Case Management Inc is a BDDS Waiver Case Management organization serving only individuals on the Family Supports Waiver and the Community Integration and Habilitation Waivers. Inspire Case Management Inc has no other current business ventures in which the organization is involved.

BUSINESS INFORMATION
HOLLI SULLIVAN
INDIANA SECRETARY OF STATE
05/12/2021 10:15 AM

Business Details

Business Name:	INSPIRE CASE MANAGEMENT INC	Business ID:	201804161253211
Entity Type:	Domestic For-Profit Corporation	Business Status:	Active
Creation Date:	04/16/2018	Inactive Date:	
Principal Office Address:	7862 W. 950 N., Fairland, IN, 46126, USA	Expiration Date:	Perpetual
Jurisdiction of Formation:	Indiana	Business Entity Report Due Date:	04/30/2022
		Years Due:	

Principal Information

Title	Name	Address
President	Mandy Lee Trimble	7862 W. 950 N., Fairland, IN, 46126, USA
Vice President	Kara Lynn Judson	7862 W. 950 N, Fairland, IN, 46126, USA
Secretary	Kara Lynn Judson	7862 W. 950 N, Fairland, IN, 46126, USA

Incorporators Information

Name	Title	Address
Kara Lynn Judson	Incorporator	7571 S. 825 E., Plainfield, IN, 46168, USA
Mandy Lee Trimble	Incorporator	7862 W. 950 N., Fairland, IN, 46126, USA

Registered Agent Information

Type: Individual
Name: Mandy Trimble
Address: 7862 W. 950 N., Fairland, IN, 46126, USA

State of Indiana
Office of the Secretary of State

Certificate of Incorporation
of
INSPIRE CASE MANAGEMENT INC

I, CONNIE LAWSON, Secretary of State, hereby certify that Articles of Incorporation of the above Domestic For-Profit Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Code.

NOW, THEREFORE, with this document I certify that said transaction will become effective Monday, April 16, 2018.



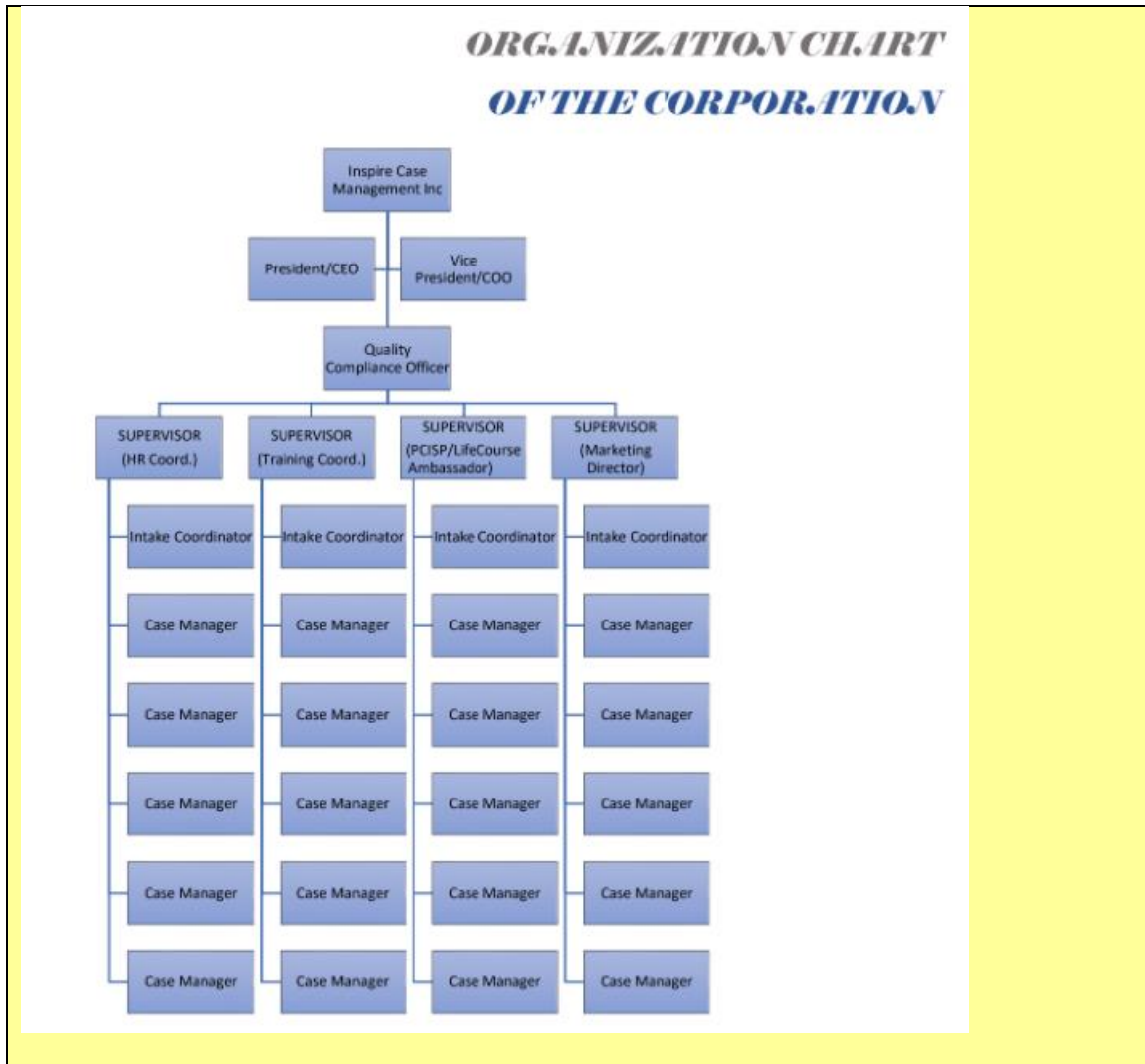
In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, April 16, 2018

Connie Lawson

CONNIE LAWSON
SECRETARY OF STATE

201804161253211 / 7887941

To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>



2.3.3 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 RFS. 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 RFS.

Please see attachment **2.3.3 Appendix A – Inspire Financials** for Quarterly Income Statements and Balance Sheets for years 2019, 2020 and Quarter 1 of 2021.

- 2.3.4 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 particular 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).

Inspire Case Management Inc President, Mandy Trimble and Vice President, Kara Judson both take personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. Both President and Vice President shall share the responsibilities for the custody of the corporate funds and securities, shall keep full and accurate records and accounts of receipts and disbursements in books belonging to the Corporation, and shall keep the monies of the Corporation in a separate account in the name of the Corporation. The Treasurer shall provide to the President and directors, at the regular meetings of the Board, or whenever requested by the Board, an account of all financial transactions and of the financial condition of the Corporation.

- 2.3.5 Contract Terms/Clauses** - Please provide the requested information in RFS Section 2.3.5.

Inspire Case Management does accept the terms as written in Attachment B – Sample Contract. That said, we have attached a redlined copy of the Sample Contract with a few minor requested edits to sections 17 and 28, for the State’s review.

- 2.3.6 Reserved**

- 2.3.7 Registration to do Business** - Selected out-of-state Respondents providing the products and/or services required by this RFS must be registered to do business within the State by the Indiana Secretary of State and the Indiana Department of Administration, Procurement Division. The address contact information for this office may be found in Section 1.18 of the RFS. 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.

Inspire Case Management is currently registered with IDOA, Procurement Division.

StateofIndiana@idoa.in.gov

to me ▼

Congratulations! Your registration as a bidder with the Indiana Department of Administration is complete.

Company Name: Inspire Case Management, Inc.

Bidder ID: 0000056876

Separate notifications containing logon information will be sent to all approved contacts created for this Bidder ID.

Inspire Case Management is currently registered to do business with the State of Indiana.

BUSINESS INFORMATION
HOLLI SULLIVAN
INDIANA SECRETARY OF STATE
05/12/2021 10:15 AM

Business Details

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Type: Individual
Name: Mandy Trimble
Address: 7862 W. 950 N., Fairland, IN, 46126, USA

State of Indiana
Office of the Secretary of State

Certificate of Incorporation
of
INSPIRE CASE MANAGEMENT INC

I, CONNIE LAWSON, Secretary of State, hereby certify that Articles of Incorporation of the above Domestic For-Profit Corporation have been presented to me at my office, accompanied by the fees prescribed by law and that the documentation presented conforms to law as prescribed by the provisions of the Indiana Code.

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Connie Lawson

CONNIE LAWSON
SECRETARY OF STATE

201804161253211 / 7887941

To ensure the certificate's validity, go to <https://bsd.sos.in.gov/PublicBusinessSearch>

Inspire Case Management is currently on the path to verification as a Woman-Owned Business through IDOA Supplier Diversity.

2.3.8 Authorizing Document - Respondent personnel signing the Transmittal Letter 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.

Mandy Trimble, President and CEO of Inspire Case Management Inc is legally authorized by the organization to commit our organization contractually.

A copy of Inspire Case Management's Corporate Bylaws attached, **2.3.8 Appendix B – Corporate Bylaws.**

2.3.9 Subcontractors - The Respondent is responsible for the performance of any obligations that may result from this RFS, 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. 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 into 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, 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 RFS or in completing the commitments documented in the proposal. The Respondent must indicate which, if any, subcontractors qualify as a Minority Business Enterprises or Women's Business Enterprises under IC 4-13-16.5-1. See Section 1.21 and Attachment A for Minority and Women's Business Enterprises information. Please enter your response below and indicate if any attachments are included.

Inspire Case Management Inc currently only has one contract, with our Nurse (RN), Vickie Alfrey.

Name: Vickie Alfrey

Address: Fairland, Indiana 46126

Position: Nurse (RN)

Purpose: to provide the following services relative to her contract, which are provided on an As Needed basis.



RN Contract for Case Management Services

This Contract (the "Contract") is entered into by and between Inspire Case Management, Inc. ("Inspire Case Management") and Vickie Alfrey, RN (the "Contractor"), and is executed pursuant to the terms and conditions set forth herein. In consideration of those mutual understanding, the parties agree as follows:

1. **Duties of Contractor.** The Contractor shall provide the following services relative to this contract, which are provided on an As Needed basis (as determined by Inspire Case Management):

Level of Care Provided:

- For consulting purposes only.
- To review and make recommendations to the team.
- To assist the team and/or family/consumer with reading and understanding the following:
 1. Psychological records;
 2. Social assessment records;
 3. Medical records
 4. High Risk Plans
 5. Additional records necessary to have a current and valid reflection of the individual.

Additional Responsibilities:

- Maintain Indiana licensure. Current license #: **28131852A**
- Will not be available for "on-call" purposes.
- Will return all follow up inquiries within 48 hours.
- Will be available to meet with Inspire Case Management on a quarterly basis to review services provided and potential future needs.

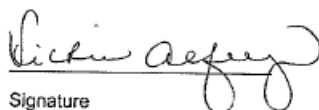
2. **Term.** This contract shall be effective as of 1/1/2021 and shall remain in effect unless otherwise terminated as set forth in section 3.

3. **Termination.** Inspire Case Management reserves the right to terminate this Contract for any reason, at any time upon at least thirty (30) days written notice to Contractor.

4. **Payment.** Contractor shall be paid at a rate of \$40 per hour, for services provided.

5. **Indemnification.** The Contractor agrees to indemnify, defend, and hold harmless Inspire Case Management, its officials, and employees, from all third-party claims and suits including court costs, attorney's fees, and other expenses cause by any act or omission of the Contractor, in the performance of this Contract. Inspire Case Management will not provide indemnification to the Contractor.

In Witness Whereof, the Contractor and Inspire Case Management have, through their duly authorized representative, enter into this Contract. The parties, having read and understood the foregoing terms of this Contract, do by their respective signatures dated below agree to the terms thereof.


Signature

Vicki Alfrey

____ 1/1/2021 ____

Date


Signature

Mandy Trimble, President

____ 1/1/2021 ____

Date

2.3.10 Reserved

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

Business Information	
Legal Name of Company	Inspire Case Management Inc
Contact Name	Mandy Trimble
Contact Title	President/CEO
Contact E-mail Address	Mtrimble@inspirecm.com
Company Mailing Address	PO Box 42826
Company City, State, Zip	Indianapolis, IN 46242
Company Telephone Number	317-652-6928
Company Fax Number	317-483-2031
Company Website Address	Inspirecm.com
Federal Tax Identification Number (FTIN)	82-5212194
Number of Employees (company)	16 employees
Years of Experience	3.5 years
Number of U.S. Offices	1
Year Indiana Office Established (if applicable)	2017
Parent Company (if applicable)	NA
Revenues (\$MM, previous year)	\$804,916.00
Revenues (\$MM, 2 years prior)	\$403,350.00
% Of Revenue from Indiana customers	100% from Indiana customers

- 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, Inspire Case Management does currently have a Disaster Recovery Plan.

Please see attachment **2.3.11.a Appendix C – Disaster Recovery Plan**

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

Technology Plan Policy:

The Technology and System Plan implemented by Inspire Case Management is one that ensures all staff have uninterrupted access to systems in order to complete the highest level of quality services to consumers. Inspire Case Management strives to ensure all technological resources and data are secure, confidential, and protected.

The Inspire Case Management Technology and System Plan includes, but is not limited to the following items:

1. Hardware
2. Software/Security/Confidentiality
3. Backup/Recovery/Disaster Recovery
4. Assistive Technology
5. Virtual Technology Assistance

Information technology is an integral part of Inspire Case Management' business strategies and practices. It is critical for the organization to proactively plan and take measures to avoid potential threats and ensure uninterrupted access to systems and data.

1. Hardware: Inspire Case Management does not maintain or own any hardware currently. Inspire Case Management employees provide their own laptop, IPAD and/or desktop. All employees access the server (BDDS Portal) provided by the state to maintain, update, and document the consumer's records. Client records are only maintained through the BDDS portal and are not to be stored on any other platform other than what is provided by the State of Indiana. All technology devices utilized by Inspire employees are required to be secured and password protected. It is also the policy of Inspire that no passwords for logging in to state systems are automatically saved and should be entered by employees at each time they are logging in.
2. Software/Security/Confidentiality: The organization uses Microsoft Word for word processing, Microsoft Excel for spreadsheets, Microsoft PowerPoint for presentations, Adobe Acrobat for viewing PDF files, Microsoft Internet Explorer, Chrome, or Firefox for browsing the World Wide Web, and Google for e-mail, online data storage through Drop Box, calendaring, and task management. Billing is completed by a single employee. It is accomplished by logging on to the State's designated website and submitting information to that website. Confidentiality is an ethical and legal issue. Employees of Inspire Case Management, especially those working with confidential health information must be extremely vigilant about protecting the client's records. Federal Law protects a consumer's right to privacy. It is the policy of Inspire Case Management to respect and acknowledge the privacy and confidentiality of the consumers in which it serves. A need-to-know basis is outlined in the Privacy Notice given to each consumer. Confidential consumer information may be released to persons or entities outside Inspire Case Management with proper authorizations or as specified in the Privacy Notice. New employees receive HIPAA privacy and technology security training at orientation, and all employees receive annual HIPAA privacy and technology security training. Inspire Case Management will provide training on the operation of all software

to new employees and those employees needing additional training. The organization will stay abreast to any changes or updates that are needed to operate current software. Inspire Case Management will provide annual training for all employees on HIPAA Security Rule. Inspire's management team will review and update the HIPAA Security Manual as needed.

3. Backup/Recovery/Disaster Recovery: The email system and online data storage in which Inspire Case Management utilizes with Google and Drop Box, provides backups, or copies, of data on their servers every 24 hours to prevent lost information. Inspire Case Management currently has a Contingency Plan in the event of an emergency located in the HIPAA Security Manual.
4. Accessibility and Accommodations: Inspire Case Management believes accessible technology is important in the workplace. Inspire Case Management currently does not have any employee that requires assistive technologies for the completion of job tasks. Accessible technology aids in the support of workforce diversity, recruit from a larger pool of candidates, and enhances team collaboration and communication among all employees—including those with disabilities. Inspire Case Management will continue to research methods to increase accessibility for families and consumers served as well as for personnel. Inspire Case Management will offer annual training on Technology Accessibility and Accommodations to provide staff with information on making technologies accessible. If a request is made, Inspire Case Management will ensure a staff is provided with or linked to the assistive technology.
5. Virtual Technology Assistance: To ensure continuity of service planning and team meetings through the recent COVID-19 Pandemic, BDDS implemented a Temporary Policy change through Appendix K, allowing the use of phone (or virtual) meetings for service planning. Case managers are essential employees therefore when necessary and when typical precautions can be observed, appropriate face to face meetings should occur. Phone (or virtual) meetings should be utilized at the request of the individual and/or family. Phone (or virtual) meetings may be utilized under the following criteria:

- Phone (or virtual) meetings require private, and secure, two-way communication and must maintain the individual's privacy.
- Phone (or virtual) meetings must not be held in public spaces, such as restaurants, cafés, etc., or via a public network.
- Case managers must document the request and need to meet by phone (or virtually) in case notes.
- The phone (or virtual) meeting is to be documented in case notes using 'Team Meeting' or 'Face-to-Face Visit' as the category; and 'Virtual' as the level of interaction as applicable.
- Pre/Post meeting monitoring checklists are to be completed with information available. For example, questions in the environment section would be answered "N/A."

It is the policy of Inspire Case Management to ensure that all Case Managers are aware of current HIPAA Regulations and carry them out according to policy and procedure. Inspire Case Management will inform Case Managers of the need to adhere to HIPAA requirements in their company contract, prior to their working with individuals. Inspire Case Management will provide each Case Manager with Initial and Ongoing Training(s) that lists all specific HIPAA requirements prior to the Case Manager working with individuals.

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

Multiple Inspire Case Management employees have previous experience serving state government either as actual state employees or with an employer who is under the guidance of the government. Specific backgrounds/previous experience of current employed Inspire Case Managers consist of:

- BDDS Group Home
- Waiver Residential
- Waiver Behavior Management
- Department of Child Services
- Special Education Teachers
- Children's Residential Facility
- Nursing Home

2.3.13 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.

Inspire Case Management only serves individuals within the State of Indiana.

Inspire Case Management focuses on being a resource to individuals and families with intellectual and developmental disabilities. When identifying key staff that not only can fulfill Inspire's mission, we are also looking for eligible Case Managers who also bring their own expertise in the field and can also be a resource to other Case Managers/coworkers. All Inspire Case Managers have previous experience in the field, serving similar clients. Specific backgrounds/previous experience of current employed Inspire Case Managers consist of:

- BDDS Group Home
- Waiver Residential
- Waiver Behavior Management
- Department of Child Services
- Arc of Indiana
- Special Education Teachers
- 21% of Inspire Case Managers with their own children in waiver services.
- ABA
- Children's Residential Facility
- Nursing Home

Inspire feels that this has provided us a solid foundation to be able to provide support to all individuals served through the FSW and CIH waivers. We pride ourselves on being able to provide our Case Managers an environment where they always have access to supports and resources for most any situation an individual is facing. Inspire's management team is not only monitoring quality of work but also helping facilitate, research and explore additional needed supports both through waiver services as well as through community outreach and natural supports building.

2.3.14 Reserved

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2.3.15 Reserved