**24-76653 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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| Indiana-headquartered Beam, Longest & Neff Emergency Management (BLN Team) is pleased to present our qualifications and approach for designing and delivering Indiana’s energy rebate programs. Our team provides the State of Indiana with the following unique benefits:   * Experience designing and implementing more than 750 energy rebate programs across the United States * Proven relationships with Indiana’s largest utilities having partnered with multiple utilities to design & implement their energy rebate programs * More than $70B in federal funds managed * A multi-faceted approach to achieving Justice 40 goals and requirements * A communications plan grounded in long-standing relationships across the Hoosier state * A nationally recognized track record of success managing large-scale federal programs on behalf of the State of Indiana |

* + 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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| Beam, Longest & Neff (BLN), a corporation, is a comprehensive government consulting and civil engineering firm formed in Indiana and headquartered in Indianapolis since 1945. Our services comprise Construction Services, Real Estate Services, Water Resources, Environmental Services, Railroad Services, Bridges and Structures, Transportation, and Energy.  BLN Emergency Management (BLN EM), a limited liability company (LLC) and subsidiary of BLN, was formed in Indiana in 2017 with its headquarters in Indianapolis as well. BLN EM has successfully partnered with numerous government agencies and provides the following services:   * State & Federal Government Consulting * Grant Management * State & Federal Compliance * Individual Assistance/Public Assistance Program Management * Staff Augmentation * Program Design & Planning * Construction Oversight & Management   **Please refer to the following attachments:**  Organizational Chart: *BLN Leadership Org Chart*  Certificate of Authority (Certificate of Existence): *Certificate of Existence – BLN & Certificate of Existence – BLN EM* |

* + 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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| Our corporate culture is grounded in facilitating open communication and collaboration from diverse viewpoints and perspectives. This commitment to diversity is reflected in our corporate board, where 1/3 of all members are minorities. Having a multitude of voices enables us to better understand the communities we serve. Intentional strategies guide our hiring and recruitment policies to foster an environment that creates equitable and just opportunities for all.  Diversity, equality, and inclusion are at the forefront of our program design as we train, hire, and build relationships across various communities. We have committed to addressing diversity in every aspect of our business operations. From our Executive Board to the suppliers and subcontractors we work with, we recognize it is vital to celebrate our differences and provide fair opportunities to be successful. We support diversity and actively recruit diverse suppliers owned by minorities, women, veterans, members of the LGBT community, service-disabled veterans, HUBZone, and small disadvantaged businesses.  A foundational component of our program design approach is maximizing its impact within each community. We do this in a variety of ways:   * Incorporating Community Stakeholders (CBOs) & Not-for-Profits * Maximizing Job & Contractor Opportunities for Small, Minority, Women & Disadvantaged Businesses * Collaborating with Career & Vocational Training Programs   We pride ourselves on taking a whole community approach to our program design and implementation to maximize outcomes and results. |

* + 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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| BLN Emergency Management, LLC (BLN EM) is a wholly owned subsidiary of Beam, Longest & Neff, LLC (BLN). The attached Dunn & Bradstreet Business Report shows BLN’s financial stability, including BLN EM’s finances.  **Please refer the following attachment:**  Dunn & Bradstreet Business Report: *BLN D&B Report* |

* + 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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| As CFO of BLN and BLN Emergency Management, LLC, Ron Ellis takes full responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal for the IRA Energy Rebate Programs. BLN is audited by external financial auditors annually. As part of this process, internal controls and segregation of duties are documented and tested by the external auditors. |

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

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| BLN is not requesting any exceptions to the contracts at this time. |

* + 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 | State of Indiana Housing and Community Development Authority |
| Company Mailing Address | 30 S. Meridian Street |
| Company City, State, Zip | Indianapolis, IN 46204 |
| Company Website Address | [www.in.gov/ihcda](http://www.in.gov/ihcda) |
| Contact Person | Rich Harcourt |
| Contact Title | Chief Financial Officer |
| Company Telephone Number | 317.233.0928 |
| Company Fax Number | N/A |
| Contact E-mail | [Rharcourt@ihcda.in.gov](mailto:Rharcourt@ihcda.in.gov) |
| Industry of Company | Government Agency |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | Dominion Virginia Power |
| Company Mailing Address | 600 East Canal Street |
| Company City, State, Zip | Richmond, VA 23219 |
| Company Website Address | [www.dominionenergy.com](http://www.dominionenergy.com) |
| Contact Person | Anitra C. Watson |
| Contact Title | Energy Conservation Manager |
| Company Telephone Number | 804.337.4895 |
| Company Fax Number | N/A |
| Contact E-mail | [anitra.c.wilson@dominionenergy.com](mailto:anitra.c.wilson@dominionenergy.com) |
| Industry of Company | Energy/Utility |
| **Customer 3** |  |
| Legal Name of Company or Governmental Entity | Nicor Gas |
| Company Mailing Address | 1844 Ferry Road |
| Company City, State, Zip | Naperville, IL 60563 |
| Company Website Address | [www.nicorgas.com](http://www.nicorgas.com) |
| Contact Person | Kari McCue |
| Contact Title | Manager, Energy Efficiency Operations |
| Company Telephone Number | 630.450.9923 |
| Company Fax Number | N/A |
| Contact E-mail | [kmccue@southernco.com](mailto:kmccue@southernco.com) |
| Industry of Company | Energy/Utility |

**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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| BLN Emergency Management is registered with the Secretary of State to do business in Indiana. Our Business ID is 201709011212349. Our next Business Entity Report is due on 9.30.2025. |

* + 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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| James B. Longest, PE, is the president of BLN and BLN EM. He is authorized to sign for BLN EM per the attached corporate resolution.  **Please refer the following attachment:**  Proof of Authority – Corporate Resolution: *BLN Corporate Resolution* |

* + 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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| The BLN Team engaged XBE firms that provide outstanding services to the state of Indiana. We determined that Sondhi Solutions (MBE), RJL Solutions (WBE), and Veteran Strategies (IVOSB) offer value-added services and will help the BLN Team deliver successful Home Energy Rebate programs for Indiana. We have met or exceeded all the XBE goals in this proposal and developed strategies to further expand XBE participation throughout the implementation phase.  Firms Invited to Discuss Potential Partnerships:  Minority (MBE) – Sondhi Solutions, LLC Women (WBE) – RJL Solutions, LLC Veteran (IVOSB) – Veteran Strategies, Inc |

* + 1. **Evidence of Financial Responsibility** – Removed at the request of the agency.

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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 | BLN Emergency Management |
| Contact Name | James B. Longest, PE |
| Contact Title | President |
| Contact E-mail Address | [jlongest@b-l-n.com](mailto:jlongest@b-l-n.com) |
| Company Mailing Address | 8320 Craig Street |
| Company City, State, Zip | Indianapolis, IN 46250 |
| Company Telephone Number | 317.806.3001 |
| Company Fax Number | None |
| Company Website Address | [www.b-l-n.com](http://www.b-l-n.com) |
| Federal Tax Identification Number (FTIN) | 82-2797143 |
| Number of Employees (company) | 800 North American Team Members |
| Years of Experience | 78 |
| Number of U.S. Offices | 13 |
| Year Indiana Office Established (if applicable) | 2017 |
| Parent Company (if applicable) | Beam, Longest & Neff, LLC |
| Revenues ($MM, previous year) | $55,880,871 |
| Revenues ($MM, 2 years prior) | $46,607,924 |
| % Of Revenue from Indiana customers | 78% |

* 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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| Yes.  **Please refer to the following attachments:**  Disaster Recovery Plans: *BLN Data Backup Policy & RI Disaster Recovery Policy BLN Team* |

* 1. What is your company’s technology and process for securing any State information that is maintained within your company?

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| The BLN Team maintains stringent data privacy and information security practices to protect all data and information. Our data security policies and protocols align with industry best practices to securely handle and store the State’s program information. In addition to our internal policies and established controls, we will work with the State to securely handle and store your information per the applicable contract requirements.  iEnergy Web Platform  We will leverage iEnergy’s modern infrastructure, monitoring, security tools, and processes to protect sensitive client information. An annual SOC2 Type II audit certifies the expected level of security, tools, and processes in place. Encryption is used to protect data in transit and at rest. Using our web tools, specific attributes can be designated as secure for additional masking and protection at the application level and reporting. Secure, role-based access allows different security privileges for users including project managers, customers, industry partners, and trade allies. iEnergy offers audit trails at various levels using transaction, user, and system logs.  Some of the information security practices we have in place include:   * Access restrictions based on role; requirements for valid user ID & passwords; LDAP to authenticate & authorize Directory Service * Personnel background checks & training * Vendor security that requires vendors, contractors & subcontractors to enter into format agreements to comply with our data security requirements * Incident response plans to respond to cybersecurity & other security incidents * Encryption & end-point protection that uses SFTP 256-bit secure socket layer (SSL) encryption, BitLocker technology to secure data stored on laptops; & managed Symantec Endpoint Protection to protect laptops and servers * Quarterly penetration & vulnerability testing * Documented close-out procedures that we follow to destroy participant information in accordance with records retention requirements of our contracts * Security standards where we undergo an annual, independent, third-party SSAE16 SOC 2 audit that covers the design and operating effectiveness of software controls related to security, confidentiality & availability.   Encryption & Data Security  Local Data Encryption – If State data is stored within local network storage, the BLN Team employs robust encryption standards. This includes the use of AES 256-bit encryption for data at rest and TLS 1.2 for data in transit, as per our Communication Encryption Policy. This ensures the safety and integrity of State information, regardless of where it is stored.  Access Control  **DUO for Microsoft Identities:** We utilize DUO for Multi-Factor Authentication, which is specifically applied to our Microsoft identities. This includes any systems or applications that are integrated with our Single Sign-On (SSO) solution.  **Scope of Protection:** This multi-factor authentication (MFA) implementation ensures that any access to State information via BLN's Microsoft-based systems or applications integrated with our SSO is securely protected with an additional authentication factor, providing a robust layer of security.  Data Integrity and Privacy  **Commitment to Data Accuracy:** The BLN Team is dedicated to maintaining the accuracy and confidentiality of data. Our protocols, which cover both cloud and local storage, ensure the utmost privacy and integrity of State information.  Compliance and Audits  **Regular Reviews:** We conduct periodic reviews and audits of our internal systems. These reviews ensure ongoing compliance with policies, aligning with the State’s requirements for information security.  Policies  **Policy Overview:** We have implemented comprehensive policies covering password management, communication encryption, hardware use, and data protection.  **Role-Based Responsibilities:** Our policies clearly define roles and responsibilities for all employees, emphasizing the importance of adherence to these security protocols.  We define security and privacy requirements in policy documents that establish roles and responsibilities, data classifications and handling and protection of the various classifications of data, highlights access controls, backups, password policy, retention requirements, security incident reporting, employee training and awareness, website privacy notices, backups, and other key procedures relevant to managing the program and protecting client and customer data.  As a result, the State can be confident in performance reporting to evaluators and all stakeholders with full audit trails. |

* + 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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| BLN, a consulting and civil engineering firm headquartered in Indiana, has provided consulting and technical services to the State of Indiana and local government units in all 92 counties since 1945. In addition to our proven track record working with Indiana, we have served numerous other states, including Alabama, Michigan, Kentucky, West Virginia, Colorado, Illinois, Wyoming, Nevada, New Mexico, Arizona, Louisiana, and Puerto Rico. |

* + 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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| BLN EM is Indiana’s leading federal program management firm. Having served the State of Indiana and various local government units on numerous complex initiatives, BLN has administered tens of billions of dollars of federally funded programs and projects across Indiana. Our professionals have played integral roles in the following programs in recent years:   * $168 Million Homeowner’s Assistance Fund for Indiana Housing & Community Development Authority (U.S. Dept. of Treasury National Model Plan 2 years) * State of Indiana – Covid-19 Emergency Rental Assistance Program * Government of Puerto Rico – Various Federally-funded Programs Related to Response & Recovery from Hurricanes Irma & Maria * State of Michigan – Program Management Services for $5 Billion Gordie Howe International Bridge Program * State of Arizona – Covid-19 FEMA Public Assistance * State of Indiana – Covid-19 FEMA Public Assistance |

* + 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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| BLN Emergency Management is Buy Indiana Certified. This certification will expire on 11.07.2028. We will be claiming 1 preference to claim eligibility for Buy Indiana points. |

* + 1. **Payment -** Removed at the request of the agency.

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* + 1. **Extending Pricing to Other Governmental Bodies** – Removed at the request of the agency.