**RFS 24-77045 BUSINESS PROPOSAL**

**ATTACHMENT C**

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

***Business Proposal***

* + 1. **Respondent’s Organizational Structure** - Please include in this section the legal form of the Respondent’s organization, the state in which it is formed (accompanied by a certificate of authority), the types of ventures in which the organization is involved, and a chart of the organization. Please enter your response below and indicate if any attachments are included.

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| Centerstone of Indiana, Inc., a **not-for-profit 501(c)(3)**, behavioral healthcare organization, has 65+ years of experience providing comprehensive trauma-informed, community-based healthcare for children, youth, families, and adults in the State of Indiana (see Appendix A. Certificate of Authority [i.e., Certificate of Existence], attached). Centerstone also maintains accreditation through the Commission on Accreditation of Rehabilitation Facilities (CARF) and received a three-year accreditation, the highest level given, in 2022. Centerstone is certified by FSSA/DMHA as an Addiction Services Provider and a Community Mental Health Center (CMHC). Moreover, Centerstone is the designated CMHC in 15 counties, including Bartholomew, Monroe, and Wayne counties. Centerstone has **ventures** in an array of mental health and substance use disorder services including: screening; assessment; individual and group therapy; *Medication Assisted Treatment (MAT)*; medication management; addiction recovery; children and family counseling; services for military members and their families; crisis and urgent care interventions; sexual abuse counseling; forensic evaluation; housing; pharmacy; psychiatric care; and vocational and workplace coaching (e.g., Employee Assistance Programs). Centerstone of Indiana’s executive leadership is led by Suzanne Koesel, Chief Executive Officer; Robb Backmeyer, Chief Operating Officer; and Brit Vincent, Finance Officer. Centerstone’s complete organizational structure is depicted in the Chart of the Organization (Appendix B). |

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

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| Building on the agency’s noble purpose of delivering care that changes people’s lives, Centerstone has identified and declared its key values to be respect, integrity, expertise, and empowerment. Stemming from these values is Centerstone’s commitment to **diversity, equity, and inclusion** (DEI). Centerstone’s DEI efforts were **prioritized** in the wake of the 2020 social unrest. For example, executive leadership hosted 10 *Speak. Listen. Act.* sessions that provided a platform for Black employees to safely share their feelings/thoughts and for non-Black employees to listen/learn from their Black colleagues. Kayla Spikes was named Centerstone’s Diversity, Equity, & Inclusion Manager and is tasked with leading Centerstone’s DEI initiatives, with support from Centerstone’s Chief Human Resources Officer.  One of Centerstone’s main DEI initiatives was the creation of the Employee Resource Groups (ERGs). Centerstone's 6 current ERGs (e.g., Black and Brown Professional Network, Pride+, Veterans and Military Families, Centerstone’s Women’s Network), with roughly 1,175 members, serve as a space for individuals to have a sense of community and shared experience within the workplace. Since their launch in 2020, the work done by ERG members have led to internal policy changes at Centerstone, including the celebration of Juneteenth as a paid company holiday, leave gap pay for military service employees when called to duty, normalizing the use of preferred pronouns (e.g., option to display pronouns in email signatures), and paid Bonding Benefit leave after the birth/adoption of a child. Twice weekly, Centerstone disseminates content related to the agency’s DEI efforts via the One Centerstone newsletter, and additional content is available on the DEI hub accessible via the employee intranet. At the leadership level, Centerstone leaders engage in regular, meaningful conversations that relate to organizational culture. Leaders have supported the implementation of learning opportunities from staff/ERG members, as well as discussion about topics like bias and how the agency can improve hiring practices to mitigate bias. For example, Centerstone offered 10 “Increasing Cultural Competence” sessions for staff, in which 400 members participated. Leadership has also supported safe spaces and critical conversations, hosted by ERGs, for staff to share thoughts/ feelings about difficult world events.  In order to **measure** the agency’s DEI efforts, Centerstone launched its first DEI Pulse Survey in February 2021 that asked questions related to engagement and inclusion, as well as open-ended questions as it relates to DEI in the workplace. Centerstone used this as a baseline to identify areas of progression and improvement pertaining to diversity, equity, and inclusion in the workplace, and guide the agency’s journey of being a safe place where people of all backgrounds feel welcome and empowered. In 2022, Centerstone began capturing feedback on its DEI efforts via the annual Employee Engagement Survey. Similar to the 2021 DEI Pulse Survey, the Employee Engagement Survey is used to collect data, identify themes, and gain insight related to employee engagement and identify areas of improvement. The 2022 Employee Engagement Survey surpassed the overall benchmark average score of 79%, with the agency scoring an overall average of 83%. In addition to the DEI survey metrics, the DEI Team and Quality Improvement Executive Leadership Team review and update annually the Cultural Competence Diversity Plan, which contains goals, measurable objectives, and a timeframe for Centerstone’s yearly DEI efforts.  ***Executive Leadership and Board Member Demographics:*** Centerstone of Indiana’s Executive Leadership comprises 86% female and 14% male individuals; all identify as White (not Hispanic or Latino); all are between the ages of 50 to 65; and Executive Leadership includes those who identify as LGBTQ. The agency’s Board Members comprise 54% female, 46% male, 92% White (not Hispanic or Latino), and 8% African American individuals. The Board includes 15% who are between the ages of 40-50; 39%, ages 50-65; and 46%, ages 65+. |

* + 1. **Organization Financial Information** - This section must include documents to demonstrate the Respondent’s financial stability. Examples of acceptable documents include the Respondent’s most recent Single Audit (if applicable) or other 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.**

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| Centerstone’s fiscal and accounting procedures safeguard prudent use and accurate accounting of funds, ensuring **financial stability**. Centerstone’s Finance Officer is responsible for managing the finance team and is tasked with assuring that all fiscal policies/procedures/processes are implemented, including ensuring compliance with Generally Accepted Accounting Principles (GAAP). The finance team (e.g., procurement, grant compliance and oversight, compliance, billing) is responsible for a variety of roles including leading the yearly budgeting process; processing/ verifying/reconciling billing, collections, and invoices; working with external auditors; completing and issuing financial reports for operations management; monitoring to ensure compliance with grant and fiscal requirements; and reporting fiscal information to the Executive Leadership team and Board of Directors. All records are retained in the *Workday ERP System* effective January 1, 2019, and prior to that date, in the *SAGE Abila Accounting System*. These systems enable effective control and accountability for funds, identify the source and application of funds, compare outlays with budget amounts, and provide comprehensive accounting records. Supporting documentation is maintained by individual fiscal departments; electronic back-ups are conducted daily to ensure adequate updating and retention of all recorded data. Please see Centerstone’s audited financial statements for fiscal years 2021 and 2022 as demonstration of the agency’s financial stability (Appendix C). The external auditing group, LBMC, found no weaknesses, significant deficiencies, or noncompliance with regards to Centerstone’s internal control over financial reporting. |

* + 1. **Integrity of Organizational 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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| Suzanne Koesel, Centerstone of Indiana’s CEO, **takes personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal.** This includes separation of audit functions from corporate boards and board members, the manner in which Centerstone assures board integrity, and the separation of audit functions and consulting services. Centerstone and its affiliates have successfully administered over $300 million in federal, state, and local grant awards since 2004, operating in full compliance with federal fiscal, administrative, and programmatic rules and regulations. Grants and contracts are routinely monitored for quality and effectiveness by external auditors, and are compliant with all required management/reporting controls. Centerstone’s structural integrity/financial reporting processes, to be maintained throughout and beyond the contract period, are consistent with the goals/objectives of Sarbanes Oxley Act of 2002, H.R. 3763 including, corporate responsibility, enhanced financial disclosures, etc.  Centerstone maintains corporate responsibility via separation of audit functions from board members of each Centerstone company (i.e., Centerstone affiliate). The parent organization’s (Centerstone of America) Board of Directors designates independent auditors for all affiliates, including Centerstone of Indiana, with approval of auditor by the individual affiliate. The independent auditors perform in accordance with auditing principles contained in Government Auditing Standards, issued by the Comptroller General of the United States, and the Guidelines for Examination of Entities Receiving Financial Assistance issued by the Indiana State Board of Accountants. Centerstone engages with consultants on an as-needed basis for specific skills or assistance in areas where gaps are identified in program infrastructure, or to improve or enhance client services, but are not engaged for internal audit functions. All records are retained/maintained by individual fiscal departments. Centerstone of Indiana has ratified the Conflicts of Interest policy to ensure board integrity. |

* + 1. **Contract Terms/Clauses** - Please provide the requested information in RFS Section 2.3.5.

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| Centerstone has **reviewed Attachment B – Sample Contract and accepts** all mandatory and substantively required clauses/terms. As such, Centerstone does not require additional contract terms or alternative wording. |

**2.3.6 Registration to do Business** – Per RFS 2.3.6,Respondents providing the services required by this RFS 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 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.

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| Centerstone of Indiana, Inc., is an Indiana-based business **registered with the Secretary of State** and with the Indiana Department of Administration, Procurement Division, as designated under BUY Indiana. The Indiana Secretary of State has certified that Centerstone duly filed the requisite documents to commence business activities under the laws of the State of Indiana. See Certificate of Authorization (i.e., Certificate of Existence) (Appendix A). |

**2.3.7 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 organization bylaws or an organizational 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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| Centerstone’s Organization Bylaws, ratified by the Board of Directors, **legally authorize Centerstone of Indiana’s CEO, Suzanne Koesel, to commit the organization contractually** (see Section 7.2 of Centerstone’s Bylaws, Appendix D). Suzanne Koesel has provided her signature on the Executive Summary, indicating Centerstone’s willingness to provide the requested services/products according to the RFS’ terms/ conditions, including the identified mandatory contract clauses. |

**2.3.8 General Information -** Each Respondent must enter your organization’s general information including contact information.

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| **Organizational Information** |  |
| Legal Name of Organization | Centerstone of Indiana, Inc. |
| Contact Name | Suzanne Koesel |
| Contact Title | Chief Executive Officer |
| Contact E-mail Address | Suzanne.Koesel@centerstone.org |
| Company Mailing Address | 645 S. Rogers Street |
| Company City, State, Zip | Bloomington, IN 47403 |
| Company Telephone Number | (800) 344-8802 |
| Company Fax Number | (812) 337-2259 |
| Company Website Address | https://centerstone.org/ |
| Employer Identification Number (EIN) or Federal Tax Identification Number (FTIN) (please specify which) | EIN: 35-1147323 |
| Number of Employees (company) | 1,221 |
| Years of Experience | 65+ |
| Year Indiana Office Established (if applicable) | 1957 |
| Parent Company (if applicable) | Centerstone of America, Inc. |
| Revenues ($MM, previous year) | $91,902,374 |
| Revenues ($MM, 2 years prior) | 2021: $89,482,714  2020: $84,827,824 |
| % Of Revenue from Indiana | 100% |