

**MASTER AGREEMENT #072225****CATEGORY: 2 and 3 – Virtual Behavioral Health Therapy and Related Services****SUPPLIER: Lighthouse Therapy LLC**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Lighthouse Therapy LLC, 14493 S. Padre Island Dr., Suite A PMB 667, Corpus Christi, TX 78418 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on September 26, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
1. **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #072225 to Participating Entities. In Scope solutions include: Virtual Behavioral Health Therapy and Related Services for the following categories:
- a. **CATEGORY 2. Public Safety Employees;**
- i. Psychology or Social work;
 - ii. Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs;
 - iii. Crisis support, suicide prevention; and
 - iv. Assessment or diagnostic services.
- b. **CATEGORY 3. K-12 and Higher Education Students and Faculty; Speech and Occupational Therapy;**
- i. Psychology, Social work, or Special Education Services;
 - ii. Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs;
 - iii. Crisis support, suicide prevention;
 - iv. Assessment or diagnostic services;
 - v. Speech; and
 - vi. Occupational Therapy.
- c. Management, administration, personnel, tools, equipment, supplies, reporting, technical assistance or support, training, and technology related or incidental to the offering of the solutions described in a.-b. above.
- 7) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 8) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 9) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.

10) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.

11) **Open Market.** Supplier's open market pricing process is included within its Proposal.

12) Supplier Representations:

i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.

ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.

iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.

13) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the term of this Agreement.

14) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcwell if this certification changes at any time during the term of this Agreement.

15) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.

- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.
- ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.
- iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

- ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.
- x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.
- xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.
- xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related

to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

Article 2: Sourcewell and Supplier Obligations

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
 - Identify the applicable Sourcewell Agreement number;
 - Clearly specify the requested change;
 - Provide sufficient detail to justify the requested change;
 - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
 - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:

- Maintenance and management of this Agreement;
- Timely response to all Sourcewell and Participating Entity inquiries; and
- Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.
- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.

- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.
- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.

- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 19) **Grant of License.**
- a) **During the term of this Agreement:**
 - i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.
 - ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.
 - b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.
 - c) **Use; Quality Control.**
 - i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
 - ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

- d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.
- 20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.
- 21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
- \$1,500,000 each occurrence Bodily Injury and Property Damage
 - \$1,500,000 Personal and Advertising Injury
 - \$2,000,000 aggregate for products liability-completed operations
 - \$2,000,000 general aggregate
- b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
- c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising

out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

- d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.
- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

Article 3: Supplier Obligations to Participating Entities

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

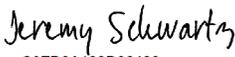
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such

terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.

- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

Lighthouse Therapy LLC

Signed by:

C0FD2A139D06489...

By: _____
Jeremy Schwartz
Title: Chief Procurement Officer

Date: 9/22/2025 | 3:39 PM CDT

Signed by:

DF8A1EA5391940D...

By: _____
John Higbee
Title: Executive VP of Sales

Date: 9/22/2025 | 3:38 PM CDT

RFP #072225 - Virtual Behavioral Health Therapy and Related Services

Vendor Details

Company Name: Lighthouse Therapy LLC

Does your company conduct business under any other name? If yes, please state: Lighthouse Online Therapy Services LLC

Address: 14493 S Padre Island Drive
STE A PMB 667
Corpus Christi, TX 78418

Contact: Janet Courtney

Email: janet@lighthouse-therapy.com

Phone: 517-234-3914

Fax: 844-367-7703

HST#: 83-1176479

Submission Details

Created On: Monday June 09, 2025 17:04:17

Submitted On: Tuesday July 15, 2025 11:35:04

Submitted By: Janet Courtney

Email: janet@lighthouse-therapy.com

Transaction #: a2e00084-fe0d-4cd6-a5b7-5f6472d85dc1

Submitter's IP Address: 147.243.119.22

Specifications

Table 1: Proposer Identity & Authorized Representatives (Not Scored)

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond “N/A” if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer’s corporate organization affiliation.

Line Item	Question	Response *
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Lighthouse Therapy LLC
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	N/A
4	Provide your CAGE code or Unique Entity Identifier (SAM):	N/A
5	Provide your NAICS code applicable to Solutions proposed.	N/A
6	Proposer Physical Address:	14493 S Padre Island Dr., STE A PMB 667 Corpus Christi, Texas 78418
7	Proposer website address (or addresses):	www.lighthouse-therapy.com
8	Proposer’s Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer):	John Higbee Executive VP of Sales 14493 S Padre Island Dr., STE A PMB 667 Corpus Christi, Texas 78418 john@lighthouse-therapy.com 801.599.3708
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	John Higbee Executive VP of Sales 14493 S Padre Island Dr., STE A PMB 667 Corpus Christi, Texas 78418 john@lighthouse-therapy.com 801.599.3708
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	N/A

Table 2A: Financial Viability and Marketplace Success (50 Points, applies to Table 2A and 2B)

Line Item	Question	Response *
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	<p>Before starting Lighthouse Therapy in 2018, our founder, Janet Courtney, worked in online therapy services. She saw first-hand the problem with a company ran by investors and businessmen. Decisions were regularly made to improve the bottom line that negatively affected therapists, schools, and ultimately the students. She knew that a company's profits shouldn't come before a student's well-being. So she started Lighthouse Therapy (LHT). LHT is started by a therapist for therapists. Janet knows the struggles of conducting sessions online. So every decision we make is around helping our therapists and students be successful. The results? Students get the highest quality therapy services resulting in happy parents and school administrators.</p>	*
12	What are your company's expectations in the event of an award?	<p>If awarded the Master Agreement, Lighthouse Therapy expects to fully execute and honor the terms outlined in the contract. We will: Assign a dedicated Sourcewell Account Manager to oversee implementation, onboarding, and ongoing support for Participating Entities. Train our sales and service staff to ensure understanding of Sourcewell's cooperative purchasing model, eligibility requirements, and pricing structures. Launch a targeted marketing and outreach campaign, including a dedicated Sourcewell webpage, email campaigns, and webinars for eligible entities. Maintain service delivery across all U.S. states and Canadian provinces through our existing virtual infrastructure and licensed provider network. Adhere to all reporting and administrative fee obligations, submitting quarterly reports and timely remittances as required. Respond quickly and collaboratively to inquiries, implementation requests, and performance reviews from Sourcewell and Participating Entities. Our goal is to ensure a seamless, value-driven experience for Sourcewell members by being responsive, compliant, and easy to work with from day one.</p>	*
13	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.	<p>Lighthouse Therapy LLC is a financially stable and well-managed organization with consistent revenue growth and a strong cash position. Annual Revenue (2024): \$4,074,000 Net Income (2024): \$379,000 Founded: 2018 Type of Business: Limited Liability Company (LLC) Banking Institution: Frost Bank No bankruptcies, liens, or litigation pending or active We have sufficient working capital, no debt obligations, and the ability to scale delivery without requiring upfront payments from Participating Entities. Our financial practices are reviewed by an external accounting firm: Field's Nemeč Phone: (361) 883-7475 A signed Statement of Financial Stability has been uploaded in the document section for reference.</p>	*
14	What is your US market share for the Solutions that you are proposing?	<p>As a privately held company in a specialized and evolving sector, Lighthouse Therapy does not have access to precise national market share data. However, we estimate our U.S. market share in the virtual behavioral health and therapy space — specifically for public-sector clients including K–12, higher education, and public safety — to be less than 1% of the total addressable market at this time. Our services are currently delivered across multiple states, and we are actively expanding our reach through partnerships with educational institutions, public agencies, and cooperative purchasing entities like Sourcewell. We anticipate that this agreement will significantly enhance our visibility and market penetration across North America. While our current market share is modest, our infrastructure, provider network, and delivery model are fully scalable, positioning us to grow rapidly within the public sector.</p>	*
15	What is your Canadian market share for the Solutions that you are proposing?	<p>Lighthouse Therapy does not currently provide services to Canadian clients and therefore holds no active market share in Canada at this time. However, our virtual therapy delivery model, secure platform, and licensure structure are designed to be scalable across borders. If awarded a Sourcewell Master Agreement, we are fully open to exploring service delivery in Canada, subject to appropriate licensure, compliance, and local requirements. We view the Canadian public sector as a potential growth market aligned with our long-term expansion strategy.</p>	*
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	None	*

17	How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?	b, Lighthouse Therapy LLC is best described as a service provider. Our services are delivered directly through a secure virtual platform by a nationwide network of licensed therapists, counselors, and specialists. These providers are either: Direct employees or W-2 contractors of Lighthouse Therapy, or Credentialed 1099 professionals who contract with us under strict compliance, supervision, and quality control standards. Our sales and service force consists entirely of Lighthouse Therapy employees, including: A national Executive Vice President of Sales Regional Business Development Managers covering U.S. territories A centralized support team handling onboarding, implementation, and customer success We do not use an independent dealer or reseller network. All services, sales, and account management are conducted by internal Lighthouse Therapy personnel.	*
18	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	We currently have providers that hold the required licenses and credentials but in the case they need additional licensure, we will make sure that gets done before services are started.	*
19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcwell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	None	*
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	On the cover of Top 100 magazine	*
21	What percentage of your sales are to the governmental sector in the past three years?	99%	*
22	What percentage of your sales are to the education sector in the past three years?	100%	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	Cannon Valley SPED (\$100,000), INYO Office of SPED (\$70,000), Nacona/Montague County SPED (\$100,000), Big 4 SSA (\$200,000)	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	None	*

Table 2B: References/Testimonials

Line Item 25. Supply reference information from three customers who are eligible to be Sourcwell participating entities.

Entity Name *	Contact Name *	Phone Number *	
Annoka Hennepin School District	Andrew Heidemann	763-506-1000	*
Foley School District	Nancy Plante	320.252.8427	*
Blue Ridge Academy	Mallory Lloyd	(661) 412-9363 EXT:1037	*

Table 3: Ability to Sell and Deliver Solutions (150 Points)

Describe your company’s capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *

26	Sales force.	<p>Lighthouse Therapy maintains a dedicated national sales and outreach team to support Sourcewell Participating Entities across the United States.</p> <p>Total Sales FTEs: 4</p> <p>Geographic Coverage: All 50 U.S. states; not currently operating in Canada but prepared to expand if awarded</p> <p>Sales Team Structure:</p> <ul style="list-style-type: none"> 1 Executive Vice President of Sales (national oversight) 1 Regional Business Development Managers (East, Central, West U.S.) 2 Client Engagement Specialists (targeted outreach and follow-up) <p>All sales personnel are direct employees of Lighthouse Therapy.</p> <p>Sales team members are distinct from service providers (therapists, coordinators), but collaborate closely with the service operations team to ensure smooth onboarding and client satisfaction. Sales staff receive specialized training in cooperative purchasing, Sourcewell eligibility, and how to position our offerings within the public sector.</p>
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	<p>Lighthouse Therapy does not utilize dealers, distributors, or third-party resellers to deliver its services.</p> <p>All Solutions proposed under this RFP are delivered directly by Lighthouse Therapy LLC through our secure virtual therapy platform. We manage the full delivery lifecycle in-house, including:</p> <ul style="list-style-type: none"> Client onboarding and intake Service coordination and scheduling Service delivery by licensed professionals Client support and follow-up <p>This direct-to-client model ensures standardized quality, full compliance with licensure and privacy laws (e.g., HIPAA, FERPA), and a consistent experience for all Sourcewell Participating Entities.</p> <p>Our delivery infrastructure is highly scalable and supported by:</p> <ul style="list-style-type: none"> A national provider network of credentialed therapists, counselors, and specialists Centralized operations and support staff Licensed professionals in all U.S. states, with the ability to expand into Canada upon request
28	Service force.	<p>Lighthouse Therapy delivers its services through a nationwide network of licensed therapists, counselors, and specialists.</p> <p>Total Service FTEs: Approximately 200+</p> <p>Roles include: Licensed mental health therapists, speech-language pathologists, occupational therapists, special education professionals, and clinical coordinators</p> <p>Licensure: All providers are licensed in the states where they deliver services. We maintain active licensure coverage across all 50 U.S. states.</p> <p>Employment Model:</p> <p>The majority of providers are independent contractors (1099s) under strict credentialing, quality assurance, and clinical supervision guidelines</p> <p>Coordination, support, and QA staff are direct employees of Lighthouse Therapy</p> <p>Overlap with Sales: There is no overlap between the service team and sales team. However, clinical coordinators work closely with business development staff to ensure smooth onboarding and implementation for Participating Entities.</p> <p>This service delivery structure allows us to flexibly scale support based on demand while maintaining consistent quality, compliance (HIPAA, FERPA), and accountability.</p>
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>All orders under the Sourcewell Master Agreement will be handled directly by Lighthouse Therapy LLC, with no involvement from third-party dealers, resellers, or distributors.</p> <p>The ordering process typically follows these steps:</p> <p>Initial Contact: A Participating Entity contacts Lighthouse Therapy through our dedicated Sourcewell email, or phone line.</p> <p>Consultation: A Lighthouse Account Manager or Sales Representative meets with the entity to understand their needs and determine service scope.</p> <p>Proposal & Quote: We provide a formal proposal or quote that includes pricing aligned with the Sourcewell Master Agreement (#072225).</p> <p>Agreement & Onboarding: Upon approval, we execute a service agreement (if required by the client) and begin implementation planning and scheduling.</p> <p>Service Delivery: Services are delivered via our secure virtual platform by our licensed provider network.</p> <p>Lighthouse Therapy handles all customer interaction, contracting, billing, and support in-house, which ensures a seamless experience and consistent compliance with Sourcewell terms.</p>

30	<p>Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.</p>	<p>Lighthouse Therapy provides a responsive, structured customer service program designed to ensure seamless onboarding, fast issue resolution, and long-term satisfaction for each Sourcewell Participating Entity.</p> <p>Customer Support Structure A Dedicated Account Manager is assigned to each Participating Entity at the start of engagement. Support inquiries are handled by our Client Support Team, available via phone and email during standard business hours (8 a.m.–6 p.m. CT, Monday–Friday). For urgent matters, we offer a response escalation protocol, ensuring a supervisor responds within 2 hours during business hours. Non-urgent inquiries are typically responded to within 1 business day.</p> <p>Support Process Initial Point of Contact: Entities may reach out directly to their Account Manager or support@lighthouse-therapy.com. Ticket Creation: Each inquiry is logged into our internal CRM and assigned a case number for tracking. Case Assignment: A support specialist or manager is assigned based on the nature of the issue (technical, scheduling, billing, clinical coordination, etc.). Resolution & Follow-Up: Most issues are resolved within 1–2 business days. For complex issues, we provide proactive updates and track resolution times.</p> <p>Performance Monitoring & Incentives We track key support metrics, including first response time, resolution time, and client satisfaction scores. Support staff and coordinators receive performance-based incentives for maintaining: 95% first-response within 24 hours 90% client satisfaction on post-interaction surveys Minimal unresolved cases older than 3 days</p> <p>Ongoing Support Resources Participating Entities receive access to a Client Welcome Packet with key contacts, FAQs, and escalation protocols. Optional monthly check-in meetings are offered during implementation and service ramp-up. For large deployments, Lighthouse Therapy provides custom implementation support and a dedicated project coordinator. Lighthouse Therapy’s support model is designed to reduce administrative burden for schools and public agencies and ensure quick, proactive, and compassionate service every step of the way.</p>
31	<p>Describe your ability and willingness to provide your products and services to Sourcewell participating entities.</p>	<p>Lighthouse Therapy is fully prepared and enthusiastic about providing our virtual behavioral health therapy and related services to Sourcewell Participating Entities across the United States.</p> <p>Our delivery model is built for scale and flexibility, with: A nationwide network of licensed therapists and specialists A secure, compliant virtual platform (HIPAA and FERPA compliant) An internal team of account managers, support staff, and clinical coordinators to ensure seamless onboarding and service execution</p> <p>We understand Sourcewell’s cooperative purchasing structure and have aligned our pricing, processes, and internal training to ensure that Participating Entities can access our services easily, affordably, and compliantly.</p> <p>While we do not currently operate in Canada, we are open and willing to explore expansion into Canadian provinces if requested and will take all necessary steps to meet regulatory requirements.</p> <p>Lighthouse Therapy welcomes the opportunity to serve Sourcewell members and is committed to delivering consistent value, clinical excellence, and responsive support throughout the term of the agreement.</p>
32	<p>Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.</p>	<p>Lighthouse Therapy does not currently provide services to clients in Canada, and as such, we do not hold any active Canadian market share or licenses at this time. However, we are fully willing and able to explore expansion into Canadian provinces if awarded a Sourcewell Master Agreement and if Participating Entities in Canada express interest in our services.</p> <p>Our secure virtual delivery model, credentialing process, and teletherapy infrastructure are designed to be scalable and adaptable across jurisdictions, pending: Provincial licensing and regulatory compliance Alignment with privacy and health information laws in Canada (e.g., PHIPA)</p> <p>If requested, Lighthouse Therapy would take all necessary steps to evaluate, register, and deploy services in accordance with Canadian requirements. We are eager to grow our footprint and serve Canadian Participating Entities under the Sourcewell cooperative framework.</p>

33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	<p>Lighthouse Therapy is able to fully serve all 50 U.S. states, including rural and underserved areas, through our secure virtual delivery platform and nationwide network of licensed providers.</p> <p>At this time, we do not currently serve any areas in Canada, as we have not yet pursued provincial licensure. However, we are open and willing to expand our services into Canada if awarded a Sourcewell Master Agreement and if Canadian Participating Entities request support. We would take all necessary steps to meet applicable regulatory and licensing requirements in each province.</p> <p>Therefore, there are no geographic limitations within the United States, and only temporary limitations in Canada, pending future expansion.</p>	*
34	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	<p>All Sourcewell Participating Entities in the United States — including K–12 schools, higher education institutions, public safety agencies, municipalities, counties, and other eligible government or nonprofit organizations — will have full access to Lighthouse Therapy's Solutions under the awarded agreement.</p> <p>At this time, Canadian entities do not have access, solely due to licensure limitations. However, we are open to expanding into Canada if awarded and if demand arises. Outside of that, no account types will be restricted from accessing our services, provided they meet Sourcewell's eligibility requirements and are located in a jurisdiction where our providers are licensed to operate.</p>	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	<p>Lighthouse Therapy provides services virtually and can serve clients in Hawaii, Alaska, and U.S. Territories, subject to applicable licensure requirements.</p> <p>Hawaii and Alaska: We currently serve clients in both states. Services are delivered via our secure virtual platform. We accommodate time zone differences with flexible scheduling options. All providers delivering care are appropriately licensed in the state of service.</p> <p><input type="checkbox"/> U.S. Territories (e.g., Puerto Rico, Guam, U.S. Virgin Islands, American Samoa): We are open to serving entities in U.S. Territories; however, service availability is subject to local licensing and credentialing laws. Prior to delivering services in a territory, we would confirm: Clinical licensure requirements Privacy or regulatory considerations (if any) Language or accessibility needs specific to that population</p> <p>In short, there are no blanket restrictions, but services in U.S. Territories would require a brief jurisdictional review to ensure full legal and clinical compliance.</p>	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	<p>Yes, Lighthouse Therapy will fully extend the terms and pricing of any awarded Master Agreement to eligible nonprofit entities as defined by Sourcewell.</p> <p>We understand that many Sourcewell Participating Entities — including private educational institutions, nonprofit health providers, and community service organizations — operate as nonprofit entities. These organizations will have the same access to our services, pricing, and support as public-sector entities under the awarded contract.</p>	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>Lighthouse Therapy has developed a proactive, multi-channel marketing strategy to promote our awarded Sourcewell Master Agreement (#072225) and increase adoption among eligible Participating Entities across the U.S.</p> <p>Marketing Tactics Include:</p> <ol style="list-style-type: none"> 1. Dedicated Web Presence We will launch a dedicated Sourcewell landing page on our website explaining how to procure services, who is eligible, and what's included under the agreement. 2. Email Campaigns Targeted emails to K-12 districts, public safety agencies, higher education institutions, and municipal contacts introducing the program and how to use it. 3. Webinars & Live Info Sessions Monthly or quarterly educational webinars explaining how to access services via Sourcewell, featuring Q&A and onboarding support. 4. Conference Participation & Outreach We will feature our Sourcewell contract at education, mental health, and government-focused trade shows and virtual conferences. 5. Co-Branded Materials All marketing collateral (emails, flyers, digital brochures) will include the Sourcewell logo and contract number for visibility and trust. 6. Internal Sales Enablement All sales and support staff will receive Sourcewell training and toolkits to ensure accurate promotion and procurement guidance. <p>Our goal is to make it easy and compelling for eligible agencies to engage with Lighthouse Therapy through the Sourcewell contract — ensuring visibility, clarity, and trust from the first interaction.</p>
38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Lighthouse Therapy leverages digital marketing technology, analytics, and social media platforms to improve outreach, engagement, and conversion rates for our services — including promotion of the Sourcewell Master Agreement.</p> <p>Data-Driven Targeting We use email marketing software (e.g., Mailchimp, HubSpot) to segment campaigns by sector (education, public safety, healthcare) and track open, click, and engagement rates. Campaign performance is continuously analyzed to refine subject lines, content, and delivery timing based on what resonates with our target audience.</p> <p>Web Analytics & Conversion Tracking Our website uses tools like Google Analytics and UTM tracking to monitor traffic sources, time on page, and conversion rates — including activity tied to Sourcewell-related content. We optimize landing pages based on real-time data and heatmap insights to improve clarity and action-taking (e.g., contact form submissions).</p> <p>Social Media & Thought Leadership We actively use LinkedIn, Facebook, Podcasts and X (Twitter) to share educational content, promote webinars, and spotlight our partnership with Sourcewell. Posts are scheduled and performance-tracked using social media management tools to identify top-performing topics and ideal posting times.</p> <p>CRM & Sales Enablement Our sales and marketing teams use an integrated CRM system to track interactions, automate follow-ups, and align outreach with Sourcewell eligibility and contract terms. Marketing data informs training materials and internal performance dashboards.</p> <p>Our goal is to use technology not only to reach the right audience — but to measure, adjust, and continually improve how we support awareness and adoption of our services through Sourcewell.</p>
39	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>Sourcewell's role is to provide a compliant cooperative purchasing program that gives Participating Entities an easy way to procure pre-competed services. Lighthouse Therapy will integrate the Sourcewell Master Agreement directly into our sales process by training our sales and operations teams on eligibility requirements, pricing, and documentation. We will promote the agreement through our website, targeted outreach, webinars, and direct engagement with schools and public safety agencies, ensuring our clients know they can purchase services under this agreement quickly and compliantly.</p>
40	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	Not at this time

Table 5A: Value-Added Attributes (100 Points, applies to Table 5A and 5B)

Line Item	Question	Response *
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41	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	We provide onboarding and support training for staff and administrators at no additional cost. This includes platform navigation, scheduling, security best practices, and troubleshooting. Training is delivered by our internal team through live webinars, video tutorials, and one-on-one onboarding sessions. Custom training modules for parents and students are available if requested.	*
42	Describe any technological advances that your proposed Solutions offer.	Our secure web-based teletherapy platform uses modern cloud-based infrastructure with 256-bit encryption. We provide real-time video sessions, integrated assessments, digital resource sharing, and scheduling tools, plus bilingual support. We continue to adopt new tools to enhance client experience and therapist efficiency.	*
43	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	As a virtual provider, Lighthouse Therapy reduces the environmental impact typically associated with in-person therapy services, such as travel emissions and printed paperwork. We operate primarily paperless, use secure cloud storage, and encourage remote work for all staff. While we don't require third-party green certifications, our digital model inherently supports sustainability.	*
44	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	At this time, we do not hold third-party eco-labels for our virtual services. However, our paperless, fully remote delivery model naturally supports energy conservation and reduced carbon footprint.	*
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	Lighthouse Therapy is founded by a licensed therapist, not investors, which means all decisions are made with students' well-being first. Our model offers fully credentialed professionals, flexible scheduling, bilingual services, and easy integration into schools' existing systems. We focus on human connection and quality over high-volume caseloads, setting us apart in the industry.	*
46	Describe your screening process for pairing service providers with patients or clients for teletherapy services.	We match therapists to clients based on licensure, expertise, language needs, student demographics, and client preferences. This includes reviewing experience with specific populations (e.g., bilingual, special education) and ensuring alignment with client goals. All matches are handled by our dedicated clinical coordination team.	
47	Describe your method of delivery for proposed teletherapy services (e.g., secure video connection, web portal, online chat, two-way live video, other).	Our teletherapy services are delivered through secure, HIPAA- and FERPA-compliant two-way live video sessions using Zoom and our web-based platform. Sessions may include screen-sharing, interactive activities, and digital assessments. We also provide phone and text-based support for certain services if appropriate.	
48	Describe how your organization maintains security of patient data and alignment to applicable legal, regulatory, or professional requirements, if any.	We comply with HIPAA, FERPA, and all relevant data privacy laws. Data is encrypted in transit and at rest. Only authorized personnel have access to client information. We regularly review security policies and maintain Business Associate Agreements (BAAs) where required.	
49	Please describe where and how all user data, including personally identifiable information (PII) and protected health information (PHI), is stored.	All user data, including PII and PHI, is stored securely on U.S.-based servers with strong encryption. We use industry-standard cloud hosting providers that comply with relevant security standards. Access is controlled by strict internal policies.	
50	Describe licensures, degrees, and/or certifications your teletherapy professionals maintain.	Our professionals are licensed and credentialed in the states they serve. This includes Speech-Language Pathologists (SLPs), Occupational Therapists (OTs), School Psychologists, Counselors, Social Workers, and Board Certified Behavior Analysts (BCBAs). All credentials are verified and maintained in compliance with state and federal requirements.	
51	Describe how you ensure service quality and continuity in cases of connectivity issues or technology failures.	In the event of connectivity issues, sessions are rescheduled promptly. Our platform has a web-based backup option, and therapists are trained to use phone or other secure methods if video fails. We maintain strong internal protocols for rapid recovery.	
52	What accessibility features are included to accommodate users with disabilities (e.g., closed captioning, screen readers, adaptive interfaces)?	We offer closed captioning, screen reader compatibility, adjustable font sizes, and clear user interfaces. Therapists adapt content for students with disabilities, and we can provide interpreters or additional supports as needed.	
53	Do you offer multilingual support to cater to diverse populations? If so, please explain.	Yes. Lighthouse Therapy offers bilingual therapy services in multiple languages with a 25% bilingual uplift as noted in our Rate Sheet. We match clients with bilingual providers whenever required.	
54	If applicable, how does your solution leverage AI to enhance your behavioral health platform and service delivery?	At this time, Lighthouse Therapy does not directly integrate AI into therapy delivery. We may use AI-enabled tools for administrative efficiencies, such as scheduling or resource recommendations, but all therapy is provided live by licensed professionals.	

55	What licenses do you have and for which states?	Lighthouse Therapy is licensed and certified in all 50 states, with active contracts and licensure in MN, CA, NV, NM, TX, AL, IL, MI, OH, FL, PA, DC, UT, AZ, ID, CO, and WA, among others. Our team ensures each provider holds the proper state licensure for every assignment.
56	Describe your AI capabilities and related security measures.	Lighthouse Therapy does not currently use AI in direct service delivery. If we leverage AI in the future (e.g., for scheduling support or resource suggestions), it will be limited to administrative functions and never used to replace human clinical judgment. All AI-enabled tools will comply with HIPAA, FERPA, and other applicable laws. Any AI tools used will inherit our secure data environment, including encryption, access controls, and continuous monitoring.

Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment
57	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or resellers if available. Select all that apply.		<input checked="" type="radio"/> Yes <input type="radio"/> No	Lighthouse Therapy is a Women-Owned Business Enterprise (WBE) and a Small Business Entity (SBE) under applicable SBA size standards. We do not currently use HUB partners, dealerships, or resellers.
58		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
59		Women Business Enterprise (WBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Lighthouse Therapy is 100% woman-owned.
60		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
61		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
62		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
63		Small Business Enterprise (SBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Lighthouse Therapy qualifies as a Small Business under SBA definitions.
64		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	Lighthouse Therapy is not formally certified as a Small Disadvantaged Business.
65		Women-Owned Small Business (WOSB)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Lighthouse Therapy is Woman-Owned Small Business (WOSB) eligible.

Table 6A: Pricing (400 Points, applies to Table 6A and 6B)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *
66	Describe your payment terms and accepted payment methods.	We accept standard payment by ACH, check, or wire transfer. Standard payment terms are Net 30 days from invoice unless otherwise negotiated with the Participating Entity. We are net 15 billing.
67	Describe any leasing or financing options available for use by educational or governmental entities.	Because Lighthouse Therapy provides only professional virtual services, there is no leasing or capital financing program. Services are billed hourly or per assessment as rendered.

68	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	We typically use standard service agreements, Statement of Work (SOW) addenda for large projects, and purchase orders issued by the Participating Entity. These define the scope, terms, and agreed rates. We will upload our sample Service Agreement if needed. We do not require a separate SLA, as service standards are covered in the contract and Master Agreement.	*
69	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	Yes — we accept procurement cards (P-Cards) for payment. There is no additional fee charged to Sourcwell Participating Entities for using P-Cards.	*
70	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Our pricing is Line-Item Based — with published “Not-to-Exceed” hourly and assessment rates per service type. Pricing is fully detailed in the uploaded Rate Sheet. We do not use SKU codes for services. All pricing is valid for the full agreement term and covers all costs except bilingual uplift (25%) where applicable.	*
71	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	Because we do not maintain a separate MSRP catalog, our published Rate Sheet represents our standard direct market rate. The pricing provided for Sourcwell is already a Not-to-Exceed rate and effectively locks in a discount for any Participating Entity compared to our open market pricing.	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	We can negotiate volume discounts for larger multi-school or district-wide engagements on a case-by-case basis. These discounts typically range from 5–10% for blocks of hours exceeding a specified minimum threshold (e.g., 500+ hours per year). No automatic rebate program applies.	*
73	Propose a method of facilitating “sourced” products or related services, which may be referred to as “open market” items or “non-contracted items”. For example, you may supply such items “at cost” or “at cost plus a percentage,” or you may supply a quote for each such request.	If a Participating Entity requires additional related services outside the included scope (e.g., unique assessments), we can quote those on a case-by-case basis at cost plus a mutually agreed margin, fully disclosed up front.	*
74	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	There are no hidden costs outside our published rates except: Bilingual therapist uplift (+25%) when requested. Required travel for an in-person service (rare), which would be quoted in advance if ever needed (normally all services are virtual). No separate fees for onboarding, training, or materials.	*
75	If freight, delivery, or shipping is an additional cost to the Sourcwell participating entity, describe in detail the complete freight, shipping, and delivery program.	Not applicable — all services are virtual, so there are no freight, shipping, or delivery charges.	*
76	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Our services are 100% virtual. We deliver to all U.S. states, Canada, and territories with no additional delivery charges.	*
77	Describe any unique distribution and/or delivery methods or options offered in your proposal.	Our unique delivery method is our flexible, secure web-based therapy platform, which allows students or staff to connect from any location. Sessions can be scheduled around varied time zones and shift schedules, especially for public safety clients.	*
78	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcwell. This process includes ensuring that Sourcwell participating entities obtain the proper pricing.	Lighthouse Therapy will perform quarterly internal reviews to verify that all services billed under the Sourcwell Agreement use only approved “Not-to-Exceed” rates. We will review invoices, time logs, and usage reports to confirm compliance and provide Sourcwell with required sales reports.	*
79	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	We will track: Total hours delivered under Sourcwell. Number of Participating Entities served. Client satisfaction scores. Timeliness of service delivery. Percentage of services delivered within agreed time frames.	*

80	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	We propose the standard 2% Administrative Fee payable to Sourcewell, calculated on total gross revenue from all transactions under this Master Agreement. This fee is already accounted for in our "Not-to-Exceed" pricing and is never passed on as an extra line item to Participating Entities.	*
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Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
81	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	We have given a very competitive rate for the quality of services we offer.

Table 7A: Depth and Breadth of Offered Solutions (200 Points, applies to Table 7A and 7B)

Line Item	Question	Response *
82	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	<p>Lighthouse Therapy offers a full suite of Virtual Behavioral Health Therapy and Related Services, including:</p> <p>Speech-Language Pathology (SLP): Direct and indirect speech therapy sessions, evaluations, IEP consultations, bilingual support.</p> <p>Occupational Therapy (OT): Direct and indirect occupational therapy services, assessments, IEP consultations.</p> <p>School Psychology Services: Individual psychological counseling, assessments, IEP participation, consultations with staff and parents.</p> <p>Counseling & Social Work: Individual counseling, parent counseling, social work services, behavior intervention, crisis counseling, suicide prevention.</p> <p>Behavioral Health Services: Comprehensive mental and emotional health counseling via secure video, phone, or text sessions.</p> <p>Assessments & Diagnostics: Comprehensive assessments in all relevant disciplines (speech, occupational, psychological) and development of intervention plans.</p> <p>Bilingual Services: Multilingual providers available for all services when requested.</p> <p>Professional Development: Training for schools and administrators to implement and support virtual therapy.</p> <p>Secure Delivery: All services delivered via HIPAA- and FERPA-compliant platforms with scheduling, documentation, and usage tracking.</p> <p>Used Solutions: Not applicable — all services are provided directly by Lighthouse Therapy professionals and are not “used” or refurbished products.</p>
83	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Subcategories include:</p> <ul style="list-style-type: none"> Speech-Language Pathology Services Occupational Therapy Services School Psychology Services Individual & Group Counseling Services Social Work Services Behavioral & Emotional Health Services Crisis Support & Suicide Prevention Bilingual Therapy Services Virtual Assessments & Diagnostics Professional Development & Training for Schools

Table 7B: Depth and Breadth of Offered Solutions

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
84	Category 1: General Public Entity Employees and Citizens, if yes answer 85-88	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
85	Psychology, Social work, or Special Education Services	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
86	Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
87	Crisis support, suicide prevention	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
88	Assessment or diagnostic services	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A
89	Category 2: Public Safety Employees, if yes answer 90-93	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
90	Psychology or Social work	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
91	Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
92	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
93	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
94	Category 3: K-12 and Higher Education students and Faculty; Speech and Occupational Therapy, if yes answer 95-100	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
95	Psychology, Social work, or Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
96	Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
97	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
98	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
99	Speech	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
100	Occupational Therapy	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A

Table 8: Exceptions to Terms, Conditions, or Specifications Form

Line Item 101. NOTICE: To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Master Agreement Template provided in the “Bid Documents” section. Proposer must upload the redline in the “Requested Exceptions” upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Master Agreement.

Do you have exceptions or modifications to propose?	Acknowledgement *
	<input type="radio"/> Yes <input checked="" type="radio"/> No

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."
 - [Pricing](#) - Sourcewell MASTER RATES (1).xlsx - Tuesday July 15, 2025 11:24:16
 - [Financial Strength and Stability](#) - Statement_of_Financial_Stability signed 06-24-2025 (2).pdf - Monday July 14, 2025 20:00:43
 - [Marketing Plan/Samples](#) - Lighthouse Therapy Marketing Plan.docx - Monday July 14, 2025 20:02:29
 - WMBE/MBE/SBE or Related Certificates (optional)
 - Standard Transaction Document Samples (optional)
 - Requested Exceptions (optional)
 - Upload Additional Document (optional)

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
 - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
 - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - John Higbee, Executive VP of Sales, Lighthouse Therapy LLC

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

Yes No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum 10 Virtual Behavioral Health Therapy 072225 Mon July 14 2025 04:53 PM	<input checked="" type="checkbox"/>	7
Addendum 9 Virtual Behavioral Health Therapy 072225 Fri July 11 2025 03:02 PM	<input checked="" type="checkbox"/>	4
Addendum 8 Virtual Behavioral Health Therapy 072225 Thu July 10 2025 07:01 AM	<input checked="" type="checkbox"/>	1
Addendum 7 Virtual Behavioral Health Therapy 072225 Tue July 8 2025 08:39 AM	<input checked="" type="checkbox"/>	1
Addendum 6 Virtual Behavioral Health Therapy 072225 Mon July 7 2025 09:58 AM	<input checked="" type="checkbox"/>	8
Addendum 5 Virtual Behavioral Health Therapy 072225 Thu July 3 2025 10:04 AM	<input checked="" type="checkbox"/>	4
Addendum 4 Virtual Behavioral Health Therapy 072225 Wed July 2 2025 11:46 AM	<input checked="" type="checkbox"/>	3
Addendum 3 Virtual Behavioral Health Therapy 072225 Wed July 2 2025 11:45 AM	<input checked="" type="checkbox"/>	3
Addendum 2 Virtual Behavioral Health Therapy 072225 Wed June 18 2025 11:27 AM	<input checked="" type="checkbox"/>	2
Addendum 1 Virtual Behavioral Health Therapy 072225 Wed June 4 2025 08:22 AM	<input checked="" type="checkbox"/>	1