



MASTER AGREEMENT #072225
CATEGORY: 3 – Virtual Behavioral Health Therapy and Related Services
SUPPLIER: eLuma, 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 eLuma, LLC, 2801 N. Thanksgiving Way, #170, Lehi, UT 84048 (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 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.
 - b. 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. 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 Sourcewell 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 Sourcewell 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 Sourcewell 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

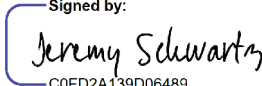
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, 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, including Supplier's form of contract, subject to revisions mutually agreed upon. 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

eLuma, LLC

Signed by:

 By: _____
 Jeremy Schwartz
 Title: Chief Procurement Officer
 Date: 10/7/2025 | 10:12 AM CDT

DocuSigned by:

 By: _____
 Zac Makin
 Title: Chief Financial Officer
 Date: 10/7/2025 | 6:44 AM MDT

RFP #072225 - Virtual Behavioral Health Therapy and Related Services

Vendor Details

Company Name: eLuma, LLC

Does your company conduct business under any other name? If yes, please state: N/A

Address: 2801 N Thanksgiving Way #170
Lehi, Utah 84043

Contact: Teresa Henderson

Email: rfp@elumatherapy.com

Phone: 385-336-7138

Fax: 877-496-3332

HST#: 45-3162889

Submission Details

Created On: Monday July 14, 2025 15:52:27

Submitted On: Monday July 21, 2025 16:07:30

Submitted By: Teresa Henderson

Email: rfp@elumatherapy.com

Transaction #: 0c52f813-2a53-45ee-8519-c69c85158707

Submitter's IP Address: 147.243.179.16

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.	eLuma, LLC	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Yes	*
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).	None	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	HJ92TLS6VJX7	*
5	Provide your NAICS code applicable to Solutions proposed.	92476, 92474, 92418, 94886, 92435, 96258	
6	Proposer Physical Address:	2801 N Thanksgiving Way #170 Lehi, UT 84048	*
7	Proposer website address (or addresses):	https://www.eluma.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):	Kami M Bible Clinical Services Manager 2801 N Thanksgiving Way #170 Lehi, UT 84048 kbible@elumatherapy.com (385) 993-3419	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Kami M Bible Clinical Services Manager 2801 N Thanksgiving Way #170 Lehi, UT 84048 kbible@elumatherapy.com (385) 993-3419	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Kami M Bible Clinical Services Manager 2801 N Thanksgiving Way #170 Lehi, UT 84048 kbible@elumatherapy.com (385) 993-3419	*

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>Founded in 2011, eLuma is a leading provider of virtual special education and mental health services for K-12 schools and educational agencies across the United States. With over a decade of experience, eLuma has built a reputation for delivering high-quality, compliant, and impactful virtual services that address a wide range of student needs, including behavioral health, mental wellness, and academic-related social-emotional challenges.</p> <p>Core Values</p> <p>Student-First Approach: Every decision we make is guided by the best interest of students.</p> <p>Equity and Access: We believe all students, regardless of location or socioeconomic status, deserve high-quality services.</p> <p>Collaboration and Support: We work hand-in-hand with school partners, becoming an extension of their internal teams.</p> <p>Data-Driven Accountability: We deliver results that are measurable and transparent.</p> <p>Integrity and Trust: We build lasting relationships through transparency, honesty, and dependable service.</p> <p>Business Philosophy</p> <p>Our philosophy centers on being a partner, not just a provider. We offer scalable, flexible, and responsive behavioral health and therapy services that align with each educational institution's goals. eLuma integrates seamlessly with school systems to enhance their capacity to support students while minimizing administrative burdens and reducing staff shortages.</p> <p>Industry Longevity and Expertise</p> <p>Over the last 14+ years, eLuma has served hundreds of districts and supported tens of thousands of students nationwide. Our deep understanding of IDEA compliance, MTSS/RTI frameworks, and best practices in teletherapy enables us to meet the evolving mental health needs of students and staff in both urban and rural communities.</p>
12	What are your company's expectations in the event of an award?	<p>Should eLuma be awarded a Master Agreement through Sourcewell RFP #072225, our expectations are as follows:</p> <p>Rapid and Seamless Implementation: We aim to establish strong communication with Sourcewell and its Participating Entities to quickly operationalize services, support onboarding, and ensure successful engagement with districts.</p> <p>Robust Marketing and Outreach: eLuma will proactively promote the Master Agreement through targeted outreach, webinars, digital campaigns, and conference participation, in collaboration with Sourcewell's cooperative marketing tools.</p> <p>Customized Service Delivery: We anticipate tailoring our solutions to the unique demographics and needs of each Participating Entity, including specialized behavioral and mental health support for students, educators, and community members.</p> <p>Data Collection, Reporting, and Compliance: We will provide ongoing analytics, usage reports, and service evaluations to meet all compliance and audit standards required by Sourcewell and its members.</p> <p>Sustained Partnership We intend to act as a strategic partner in helping Participating Entities meet both short- and long-term goals in the areas of mental health, behavioral services, and capacity building.</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.	Please see attached Audit Report

14	What is your US market share for the Solutions that you are proposing?	<p>eLuma is a nationally recognized leader in virtual mental health and behavioral therapy services for K–12 schools. Since our founding in 2011, we have partnered with over 400 schools and education agencies across 48 states. In the past three years alone, we have served 298 districts, and as of 2025, we are actively delivering services to 148 current school partners.</p> <p>Our impact includes:</p> <p>More than 58,000 students supported annually</p> <p>Over 38 million therapy minutes delivered</p> <p>A high standard of 95% IEP compliance rate</p> <p>Evidence-based services delivered through our proprietary, HIPAA- and FERPA-compliant Insight™ platform</p> <p>Although precise industry-wide data on K–12 virtual behavioral health is limited due to fragmentation and hybrid service delivery, internal benchmarking and national comparisons position eLuma as a provider serving more than 10% of all virtual mental health therapy engagements in the public education sector.</p> <p>As schools continue to seek flexible, cost-effective, and clinically sound solutions to meet rising mental health needs, eLuma stands at the forefront, offering scalable, compliant, and outcomes-driven services tailored for today's K–12 environment.</p>	*
15	What is your Canadian market share for the Solutions that you are proposing?	At present, eLuma does not hold an established market share in Canada for the delivery of virtual behavioral health therapy and related services.	*
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	<p>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).</p> <p>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?</p> <p>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?</p>	<p>eLuma is best described as a service provider. We specialize in delivering virtual behavioral health therapy, mental health services, and related supports directly to K–12 schools and educational agencies across the United States.</p> <p>All services proposed under this RFP, including Tier 1 SEL programming, Tier 2 interventions, and Tier 3 direct therapy, are delivered by a nationwide network of licensed professionals, supported by eLuma's proprietary technology platform, Insight™.</p> <p>Relationship with Sales and Service Force</p> <p>Sales and Customer Success Team: All sales, onboarding, and account management functions are handled by eLuma employees. Our internal team of implementation specialists, customer success managers, and client relationship executives work directly with Participating Entities to ensure a smooth rollout and ongoing partnership success.</p> <p>Service Delivery Professionals</p> <p>eLuma's therapy and mental health services are delivered through a network of credentialed and vetted independent contractors (1099) who are directly managed by eLuma's Clinical Services Team. Each provider undergoes rigorous screening, credentialing, training, and ongoing supervision. They are not employees of a third party or another agency, but rather are engaged and assigned by eLuma based on client needs and provider licensure match.</p> <p>Dealer Network</p> <p>eLuma does not utilize a dealer or distributor network. All contracts are fulfilled directly through our centralized service and technology infrastructure to ensure uniform quality, compliance, and accountability.</p>	*
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.	<p>As a provider of virtual behavioral and mental health therapy services, eLuma ensures full compliance with all applicable federal, state/provincial, and local licensure regulations in delivering services to K–12 educational institutions. Below is an overview of the licenses and certifications both required to be held and actually held by eLuma and its contracted professionals:</p> <p>Licenses Required for Clinical Service Providers (Contracted Therapists and Clinicians):</p> <p>All clinicians delivering services through eLuma must hold the appropriate, current state or provincial licenses for the jurisdiction in which the student or client is</p>	

located. These licenses include, but are not limited to:

- Licensed Clinical Social Workers (LCSW)
- Licensed Professional Counselors (LPC)
- Licensed Psychologists (PhD or PsyD)
- School Psychologists
- Licensed Mental Health Counselors (LMHC)

All providers are independently licensed and credentialed to practice in the states/provinces they serve.

Certifications and Background Screening

Each clinician contracted by eLuma must successfully complete the following:

- State/Federal Criminal Background Checks
- Child Abuse Registry Clearances (where applicable)
- Verification of Active Licensure via State/Provincial Boards
- Reference Checks and Credential Verification
- HIPAA and FERPA Training Certification
- Mandated Reporter Training (state-specific)

eLuma's credentialing process meets or exceeds the screening standards used by school districts, and documentation is retained for audit readiness.

Organizational Compliance and Data Protection Certifications

As a service provider working with sensitive student data, eLuma maintains institutional certifications and standards including:

- HIPAA Compliance: All platform functionality, storage, and service delivery are compliant with the Health Insurance Portability and Accountability Act.
- FERPA Compliance: All services and communications follow strict student privacy protocols.
- COPPA Compliance: For any services provided to children under 13, in accordance with the Children's Online Privacy Protection Act.
- Data Hosting & Security: All data is encrypted at rest and in transit, hosted in U.S.-based secure data centers.

Our proprietary Insight™ platform is secured using end-to-end encryption, single sign-on (SSO), and multi-factor authentication (MFA), with annual penetration testing conducted by third-party cybersecurity firms.

Internal Staff Qualifications

eLuma's internal team members who manage implementation, customer success, and clinical quality assurance hold relevant certifications and experience in:

- Education administration
- Clinical supervision
- Mental health systems and program development
- Trauma-informed care practices
- MTSS frameworks and IEP/504 compliance

Our team includes certified special educators, licensed clinicians, and former district administrators.

eLuma maintains a fully credentialed clinical workforce and supports strict compliance with all licensing, certification, and privacy requirements related to virtual behavioral health therapy services. Our processes are transparent, auditable, and designed to

		protect students, educators, and institutional partners.	
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.	Utah top 100, Top Work Places recognition, Fast Company 50 rising companies, Forbes Next 1000 up and coming companies Honoree. https://www.prweb.com/releases/eluma-recognized-as-a-2023-top-workplace-by-salt-lake-tribune-301978107.html https://www.inc.com/profile/eluma-therapy https://www.einpresswire.com/article/549078686/eluma-recognized-on-the-2021-inc-5000-list-of-fastest-growing-private-companies	*
21	What percentage of your sales are to the governmental sector in the past three years?	100%	*
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?	At this time, eLuma does not currently hold any state or cooperative purchasing agreements. However, this is a strategic growth area for our organization, and we are actively pursuing partnerships through established cooperative procurement programs like Sourcwell to expand access to our virtual behavioral health and therapy services nationwide.	*
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?	At this time, eLuma does not hold any active GSA contracts or Standing Offers and Supply Arrangements (SOSA). However, we fully recognize the value and importance of these procurement vehicles in expanding access to essential services, particularly for public agencies and institutions seeking streamlined acquisition pathways. As a rapidly growing leader in virtual mental health and behavioral therapy for K–12 education, eLuma is currently exploring opportunities to participate in federal and broader public-sector contracting programs, including GSA schedules and standing offer frameworks in both the U.S. and Canada. Our participation in the Sourcwell RFP is part of a broader strategic initiative to increase accessibility to our services through trusted cooperative and government-backed purchasing programs. We are committed to building lasting public sector relationships and look forward to reporting future sales under such agreements as these partnerships grow.	*

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 *	
Blue Ridge Academy (Inspire Charter Schools)	Elisa Hendricks, 6-12th+ Assistant Director of Special Education	(626) 317-0112 x 1155	*
Winslow Unified School District	Winslow Unified School District	(928) 288-8108	*
Southwest Kansas Area Cooperative District 613	Jason Wright, Assistant Director	(620) 789-8400	*
Houston County School District	Dr. Kristi-Lee Arrington, Director of Student Services	(478) 218-4618 x 27894	
Garfield School District	Phoebe Wiseman, Special Education & Federal Programs Director	(435) 616-8961	

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 *
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26	Sales force.	<p>eLuma maintains a highly responsive and experienced national sales force dedicated to helping schools, educational agencies, and public institutions access virtual behavioral health services quickly and efficiently. Our sales operations are structured to scale across the United States and can expand into Canada as cooperative opportunities emerge.</p> <p>Nationwide Sales Coverage (U.S.)</p> <p>Sales Team Size: eLuma's current sales force consists of 14 full-time team members, including:</p> <ul style="list-style-type: none"> 6 Regional Sales Executives, covering key U.S. territories (Northeast, Southeast, Midwest, Southwest, West, and Central) 3 Partnership Development Managers focused on emerging state, district, and cooperative procurement opportunities 2 Sales Engineers who specialize in technical demonstrations and RFP customization 3 Sales Support & Enablement Specialists <p>Employee Status: All sales professionals are direct employees of eLuma. We do not use third-party resellers, dealers, or independent agents to manage procurement relationships.</p> <p>Sales Activities:</p> <ul style="list-style-type: none"> Initial needs assessment and service scoping Platform demonstrations and solution walkthroughs Proposal support, pricing consultation, and onboarding coordination Continued engagement with client success and service teams post-contract <p>Expansion Readiness – Canada</p> <p>While we do not currently maintain an established sales force in Canada, our infrastructure is prepared to expand into Canadian provinces should opportunities arise through the Sourcewell cooperative contract. We have already identified internal resources capable of supporting Canadian Participating Entities during onboarding and procurement review and can rapidly adapt to provincial procurement regulations and service expectations.</p> <p>Sales & Service Integration</p> <p>eLuma's sales force works closely with our Customer Success and Implementation Teams to ensure a seamless transition from contract to service delivery. Sales professionals remain engaged post-sale to:</p> <ul style="list-style-type: none"> Support performance reviews and renewals Track customer satisfaction and implementation success Ensure continuous alignment with Participating Entities' evolving needs <p>This overlap between sales and service fosters continuity, trust, and long-term partnerships with every client.</p> <p>eLuma's direct-employed, U.S.-based sales team is equipped to serve Participating Entities across all 50 states. Our structure allows us to support Sourcewell's cooperative members efficiently, responsively, and with a strong focus on relationship-building and service continuity. As opportunities expand, we are fully prepared to grow our presence in Canada and continue scaling to meet national and regional demand.</p>
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27	<p>Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.</p>	<p>eLuma does not utilize a dealer, distributor, or reseller network. All services offered through this RFP, including virtual behavioral health therapy, mental health services, SEL programming, and related supports, are delivered directly by eLuma through our centralized service model.</p> <p>Direct-to-Customer Service Delivery Model</p> <p>Sales and Procurement: All procurement and sales transactions are handled by eLuma's internal sales and partnership teams, ensuring a consistent, transparent process for Participating Entities.</p> <p>Implementation and Onboarding: Services are initiated and supported by our in-house Implementation and Customer Success teams, who manage scheduling, setup, and stakeholder communication.</p> <p>Service Delivery: All behavioral and mental health services are performed by eLuma's network of credentialed, licensed providers, matched and scheduled based on the specific needs of the Participating Entity. These professionals are independent contractors (1099) who are engaged, credentialed, and supervised directly by eLuma.</p> <p>Platform and Support: All services are delivered via our proprietary Insight™ Platform, a secure, HIPAA/FERPA-compliant teletherapy solution that requires no third-party licensing or external vendors.</p> <p>Why This Approach Matters</p> <p>By not relying on resellers or third-party sellers, eLuma ensures:</p> <p>Full quality control and accountability</p> <p>Faster onboarding and response times</p> <p>Direct access to technical and clinical expertise</p> <p>Simplified pricing and contract administration</p> <p>Unified data reporting, service evaluation, and support</p> <p>eLuma's direct-service model eliminates the complexity of third-party distribution and provides Sourcewell and its Participating Entities with a single point of accountability for sales, service delivery, and customer support. This approach promotes consistency, compliance, and efficiency in all aspects of the partnership.</p>
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28	Service force.	<p>eLuma has built a highly scalable, national network of licensed professionals and support staff to deliver behavioral health therapy and related mental health services directly to K–12 schools and educational entities. Our virtual service model allows us to reach any geographic location in the U.S.</p> <p>Clinician Network</p> <p>Size & Reach:eLuma currently maintains a network of over 100,000+ licensed professionals, including:</p> <p>Licensed Clinical Social Workers (LCSW) Licensed Professional Counselors (LPC)</p> <p>School Psychologists and Licensed Psychologists (PhD/PsyD)</p> <p>Licensed Mental Health Counselors (LMHC)</p> <p>Delivery Capacity: These professionals are available to deliver services across all 50 states. Each clinician is licensed in the specific state where the student/client is located. Many hold multi-state credentials, allowing for agile deployment during surges in demand.</p> <p>Employee Classification: All clinicians are 1099 independent contractors who are vetted, credentialed, trained, and supervised directly by eLuma. They are not employed by third-party staffing agencies or resellers. Their performance is evaluated regularly through our internal quality assurance and supervision protocols.</p> <p>Implementation & Support Teams</p> <p>eLuma's internal full-time service delivery staff (employees) includes:</p> <p>Implementation Specialists (6 FTEs): Manage district onboarding, technical setup, and initial scheduling.</p> <p>Customer Success Partners (6 FTEs): Serve as ongoing liaisons with districts to ensure quality, satisfaction, and alignment with contract objectives.</p> <p>Clinical Specialists (12 FTEs): Provide clinical oversight, training, and support to field therapists to ensure service integrity and compliance.</p> <p>Help Desk & Technical Support (5 FTEs): Available 7 days/week to assist clients and providers with platform access, service continuity, and troubleshooting.</p> <p>All service support personnel are direct employees of eLuma.</p> <p>Coverage</p> <p>United States: eLuma currently provides services in 48 U.S. states, with immediate readiness to expand in any region upon award.</p> <p>Canada: While we do not currently operate in Canada, our model is flexible and prepared for expansion.</p> <p>Integrated Service Delivery</p> <p>Our service force is fully integrated into eLuma's proprietary Insight™ Platform, enabling:</p> <p>Secure session delivery (HIPAA, FERPA, COPPA compliant)</p> <p>Real-time documentation and progress tracking</p> <p>Scheduling, reporting, and communication within a single environment</p> <p>eLuma's service force, consisting of a robust network of licensed clinicians and dedicated internal teams, is designed for responsive, scalable, and high-quality virtual delivery across the U.S. Our centralized model ensures consistency, accountability, and rapid deployment, making eLuma a trusted partner for Sourcewell Participating Entities seeking behavioral health support for students and school communities.</p>
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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>Participating Entities can initiate the ordering process through multiple channels:</p> <p>Direct Contact: Schools or agencies contact an eLuma Sales representative or Customer Success Partner.</p> <p>Sourcewell Contract Reference: The Participating Entity identifies the Sourcewell contract number when reaching out to begin procurement.</p> <p>Proposal & Scope Confirmation</p> <p>After initial contact:</p> <p>eLuma works with the Participating Entity to assess service needs, student populations, and scope of services (e.g., therapy types, caseload estimates, timelines).</p> <p>A tailored service proposal and pricing quote, aligned with the pre-negotiated Sourcewell contract terms, is shared for approval.</p> <p>Once accepted, eLuma issues a formal Service Agreement under the Sourcewell umbrella contract.</p> <p>Purchase Order & Activation</p> <p>The Participating Entity issues a Purchase Order (PO) or signed agreement to eLuma.</p> <p>Upon receipt, eLuma assigns an implementation manager who initiates onboarding, clinician matching, platform setup, and scheduling.</p> <p>Services typically begin within 5–10 business days, depending on the requested start date and provider availability.</p> <p>Roles & Responsibilities</p> <p>eLuma is solely responsible for the ordering, onboarding, and service delivery process. We do not subcontract order handling to resellers, distributors, or dealers.</p> <p>All customer service, billing, and ongoing support is handled directly by eLuma's internal teams to ensure high-quality service and continuity.</p> <p>The ordering process with eLuma is direct, transparent, and efficient, designed to ensure a seamless experience for Sourcewell Participating Entities from contract activation through ongoing service delivery. There are no third-party intermediaries, which allows for faster response times, consistent support, and full compliance with Sourcewell procurement requirements.</p>
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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>At eLuma, customer service is a core pillar of our service delivery model. Our goal is to provide every Participating Entity with personalized, proactive, and responsive support that ensures program success, high satisfaction, and continuity of care for students.</p> <p>Our customer service program spans the entire lifecycle of service, from initial onboarding through ongoing performance monitoring and renewal.</p> <p>Dedicated Customer Success Team</p> <p>Each Participating Entity is assigned a dedicated Customer Success Partner (CSP) who serves as their ongoing point of contact. This individual is supported by a cross-functional team that includes:</p> <p>Implementation Specialist (onboarding/setup)</p> <p>Clinical Manager (oversight of provider performance and fidelity to service plan)</p> <p>Technical Support Specialist (troubleshooting and platform support)</p> <p>Billing/Finance Liaison (invoicing and documentation)</p> <p>This team ensures that every customer interaction is managed with speed, care, and consistency.</p> <p>Response-Time Commitments</p> <p>eLuma maintains clearly defined service level standards, including:</p> <p>Service Activation Request: Within 1 business day Live Support (Chat & Phone): Immediate during business hours (8am–6pm) Email Inquiries: Within 1 business day Platform Issues: Resolved or escalated within 24 hours Therapist Replacement: Within 3–5 business days (sooner if urgent) Urgent Student Needs: Addressed within 4 hours</p> <p>Our U.S.-based support team is available Monday through Friday from 8:00 AM to 6:00 PM MST, with on-call coverage for emergencies.</p> <p>Customer Satisfaction & Quality Assurance</p> <p>Quarterly Check-Ins: CSPs conduct regular check-ins with district stakeholders to review goals, service performance, and feedback.</p> <p>Annual Customer Surveys: Data is gathered to track satisfaction, identify opportunities for improvement, and ensure accountability.</p> <p>Real-Time Reporting: The eLuma Insight™ platform offers service dashboards, attendance tracking, and progress monitoring.</p> <p>Performance Incentives & Provider Accountability</p> <p>Therapist Scorecards: All providers are evaluated monthly on engagement, attendance, documentation quality, and student outcomes.</p> <p>Tiered Performance Rewards: High-performing therapists receive recognition, referral bonuses, and priority access to new assignments.</p> <p>Corrective Action Plans: If any performance issue arises, eLuma implements a corrective coaching plan or reassigns the provider if necessary.</p> <p>Rapid Escalation Protocol</p> <p>If an issue cannot be resolved at the CSP level, clients may escalate directly to:</p> <p>Clinical Services Manager Director of Operations Director of Customer Success VP of Growth</p> <p>eLuma's customer service program is built on fast response times, high-touch support, measurable quality controls, and a culture of continuous improvement. Our proactive communication and performance-based incentives ensure that Participating Entities receive reliable, transparent, and responsive support throughout the duration of their partnership.</p>
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31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	<p>eLuma is fully committed and well-equipped to provide virtual behavioral health, mental health, and related services to Sourcewell Participating Entities across the United States. Our team views this partnership as a strategic opportunity to expand equitable access to high-quality mental health services for K–12 students, educators, and communities through a trusted and efficient cooperative purchasing vehicle.</p> <p>Ability to Deliver</p> <p>Nationwide Reach: eLuma currently serves schools and districts in 48 U.S. states, with the infrastructure, licensure expertise, and scalability to support Sourcewell entities across all eligible regions.</p> <p>Service Capacity: We maintain a network of 100,000+ credentialed providers, capable of delivering Tier 1, Tier 2, and Tier 3 mental health services through our HIPAA- and FERPA-compliant Insight™ platform.</p> <p>Implementation & Support: eLuma's U.S.-based Implementation and Customer Success teams ensure fast onboarding, tailored solutions, and proactive, hands-on support for every client.</p> <p>Compliance Readiness: We meet or exceed all applicable clinical licensing, credentialing, and data security standards in all service regions.</p> <p>Willingness to Engage</p> <p>Strategic Alignment: We view Sourcewell as an ideal partner to eliminate procurement barriers and allow Participating Entities to contract directly with eLuma without lengthy bid processes.</p> <p>Flexible and Customizable Solutions: Whether a district requires short-term staffing, long-term programming, or full-tiered mental health frameworks, eLuma offers custom solutions that adapt to local needs and budgets.</p> <p>Commitment to Equity and Access: eLuma shares Sourcewell's mission to support communities through accessible, cost-effective services. We prioritize working with underserved, rural, and high-need populations and tailor our programs accordingly.</p> <p>eLuma is ready, able, and eager to serve Sourcewell Participating Entities with industry-leading virtual mental health services. Our team is prepared to mobilize quickly, offer consistent support, and deliver measurable impact through this cooperative contract.</p>	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	eLuma is committed to expanding access to high-quality virtual mental health and behavioral therapy services across North America, including to Sourcewell Participating Entities in Canada. While our current client base is U.S.-focused, we are actively preparing to scale our service model to meet the unique needs, regulations, and educational environments within Canadian provinces and territories.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	<p>eLuma's virtual service delivery model allows us to reach all Sourcewell Participating Entities, regardless of location, including rural, remote, and underserved communities. Our provider network and implementation infrastructure are designed to scale nationally and internationally, ensuring timely, compliant, and high-quality support wherever services are needed.</p> <p>We are committed to partnering with any eligible entity across North America to expand access to behavioral and mental health services for K–12 students and educational communities.</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>If awarded an agreement, all eligible Participating Entities, regardless of size, geographic location, or organizational type (e.g., public schools, charter schools, education service agencies, municipalities, or tribal governments), will have full access to eLuma's solutions as outlined in our proposal.</p> <p>Our mission is rooted in equity and accessibility. We are committed to ensuring that every qualified entity under the Sourcewell cooperative has the opportunity to benefit from our virtual behavioral and mental health services without limitation.</p> <p>Should specific local or regional regulatory requirements arise (such as licensure constraints in a given province or state), eLuma will work collaboratively with the Participating Entity to navigate compliance or secure necessary approvals in order to deliver services without disruption.</p>	*

35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	<p>eLuma is fully committed to providing services to Sourcewell Participating Entities located in Hawaii, Alaska, and U.S. Territories (including but not limited to Puerto Rico, Guam, U.S. Virgin Islands, Northern Mariana Islands, and American Samoa). While our virtual delivery model eliminates most geographic barriers, the following requirements and considerations may apply to ensure compliance and optimal service delivery:</p> <p>State and Territorial Licensure Requirements</p> <p>eLuma ensures that all clinicians providing services are licensed in the jurisdiction where the student resides.</p> <p>We actively maintain or pursue licensure for providers in Hawaii and Alaska, and can obtain required credentials in U.S. Territories as needed.</p> <p>For new service regions, eLuma will engage with the local licensing board and education authorities to ensure full compliance before initiating services.</p> <p>Time Zone Considerations</p> <p>Hawaii-Aleutian and other non-continental time zones are fully supported.</p> <p>Our scheduling teams work closely with Participating Entities in these regions to ensure therapy sessions, meetings, and support align with local time preferences.</p> <p>Language and Cultural Relevance</p> <p>eLuma is prepared to support English, Spanish, and other language needs upon request and can engage bilingual clinicians when appropriate.</p> <p>We tailor our services to be culturally responsive and sensitive to regional norms, including working with Indigenous and island-based communities.</p> <p>Technology Access</p> <p>eLuma's Insight™ platform is optimized for low-bandwidth environments, ensuring reliable access even in regions with limited internet infrastructure.</p> <p>We also offer tech-readiness assessments and support to help districts prepare for virtual service delivery.</p> <p>There are no restrictions on service to Participating Entities in Hawaii, Alaska, or U.S. Territories. However, eLuma will ensure that all jurisdictional licensing, scheduling, and connectivity requirements are met on a case-by-case basis. We are fully committed to expanding mental health access to students in these regions and will tailor our approach to ensure successful implementation.</p>	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	<p>Yes, eLuma will extend the terms of any awarded master agreement to nonprofit entities that qualify as Sourcewell Participating Entities under the cooperative's guidelines.</p> <p>We recognize that nonprofit organizations, including educational nonprofits, charter school networks, and community-based mental health partners, play a vital role in supporting student well-being and educational success. eLuma is fully committed to ensuring that these organizations have equitable access to our services, pricing, and support infrastructure under the same favorable terms offered to public agencies and school districts.</p> <p>There are no restrictions based on nonprofit status, and all services provided will adhere to the standards, responsiveness, and compliance measures outlined in our Sourcewell proposal.</p>	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *
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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>eLuma will partner closely with Sourcewell to promote the awarded contract. We can accomplish this through any of the following activities:</p> <p>Website placement: Promoting Sourcewell Partnership</p> <p>Email Campaigns: Targeted outreach to our database of district leaders and regional education service agencies, promoting the Sourcewell contract and its ease of use.</p> <p>Conference Presence: Joint promotion at key education and mental health conferences, such as AASA, CASE, ASHA, and NASP.</p> <p>Webinars: Virtual sessions tailored to superintendents, student services directors, and special education administrators to showcase service offerings and onboarding process.</p> <p>Print and Digital Materials: Sourcewell-branded brochures, flyers, and case studies to share with potential members.</p> <p>Partner Success Stories: Sharing success metrics and testimonials from Participating Entities using Sourcewell's contract.</p> <p>Social Media: Posting participation on social media channels</p> <p>We will collaborate with Sourcewell's marketing team to co-brand assets, amplify digital presence, and ensure compliance with brand guidelines.</p>	*
38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>At eLuma, we integrate a data-driven digital marketing strategy across multiple platforms to maximize outreach, refine messaging, and ensure our services reach the educational agencies that need them most. We utilize a variety of technologies and analytics tools to support these efforts and drive engagement with key decision-makers in the K-12 education sector.</p> <ol style="list-style-type: none"> 1. Social Media Strategy and Analytics 2. CRM and Email Marketing Integration 3. Website and SEO Performance Tracking 4. Metadata & Behavioral Data for Campaign Optimization 	*
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>We view Sourcewell as a vital partners in expanding access to high-quality virtual mental health services by streamlining the procurement process for public sector entities. Sourcewell's cooperative purchasing model provides transparency, compliance assurance, and time savings that are especially valuable to school districts, education service agencies, and municipalities seeking fast, cost-effective solutions.</p> <p>Sourcewell's Role</p> <p>Sourcewell's role includes:</p> <p>Contract Awareness & Accessibility: Listing the awarded agreement on its procurement platform for visibility and easy access.</p> <p>Promotional Support: Highlighting the contract through its website, newsletters, and regional outreach.</p> <p>Procurement Education: Helping Participating Entities understand the benefits of using a pre-competed cooperative contract.</p> <p>eLuma's Integration of Sourcewell into Sales & Partner Success</p> <p>eLuma will can integrate the Sourcewell-awarded agreement into our sales, marketing, and client engagement strategies.</p> <p>Directors of Partner Success will be trained to communicate the benefits of the Sourcewell agreement during all initial and ongoing conversations with prospective and existing district partners. They will proactively present Sourcewell as a procurement pathway that eliminates the need for an individual RFP or bid process.</p> <p>We will also educate our implementation and customer success teams to ensure seamless onboarding of Sourcewell-participating entities using this agreement.</p> <p>By embedding Sourcewell into our partner success workflows and sales materials, eLuma aims to drive widespread awareness and utilization of this procurement vehicle, making it easy and attractive for public entities to engage our services.</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.	<p>Participating entities can initiate services by submitting purchase orders (POs) via email to our dedicated billing team at billing@elumatherapy.com. This simple, streamlined process ensures rapid order confirmation and service activation. No complex onboarding to third-party procurement platforms is required.</p> <p>Our school and agency partners appreciate the ease and transparency of our process. Clients across 48 states have used this system to:</p> <p>Submit POs</p> <p>Receive digital invoices</p> <p>Track service utilization</p> <p>Monitor billing cycles and payment status through the Insight™ dashboard</p> <p>Our team is also familiar with a variety of procurement management platforms used by districts (such as BuyBoard, Bonfire, or district ERP systems) and can support those workflows when required.</p>	*
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Table 5A: Value-Added Attributes (100 Points, applies to Table 5A and 5B)

Line Item	Question	Response *	
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41	<p>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.</p>	<p>eLuma is committed to ensuring that all Sourcewell Participating Entities are well-equipped to implement and sustain high-quality virtual mental health and behavioral support services. To that end, we offer a robust training program for administrators, educators, and clinicians. These trainings are standard (included at no cost) unless otherwise noted, and are delivered by experienced eLuma staff.</p> <p>Platform & Implementation Training (Standard – No Cost)</p> <p>What's Covered: Navigation and use of our proprietary Insight™ Platform, session scheduling, documentation, progress tracking, secure communications, and support features.</p> <p>Audience: School administrators, special education directors, case managers, mental health coordinators, and liaisons.</p> <p>Who Delivers It: eLuma clinical support and Partner Success Team.</p> <p>Delivery Method: Live virtual training sessions, asynchronous video tutorials, and digital guides.</p> <p>Cost: Included in all service agreements.</p> <p>Provider Clinical Training & Support (Standard – No Cost)</p> <p>What's Covered: eLuma's clinical expectations, compliance and reporting, student engagement techniques, and integration with district-specific needs.</p> <p>Audience: Licensed therapists and clinicians assigned to the Participating Entity.</p> <p>Who Delivers It: eLuma Clinical Leadership Team.</p> <p>Delivery Method: Virtual orientation, peer collaboration, and ongoing support through the eLuma provider community, training and resource platform.</p> <p>Cost: Included in all service agreements.</p> <p>Staff & Educator Mental Health Training (Optional – Available Upon Request)</p> <p>What's Covered: Trauma-informed practices, recognizing signs of mental distress, SEL integration, classroom mental health strategies, de-escalation techniques.</p> <p>Audience: General education teachers, paraprofessionals, counselors, and school leaders.</p> <p>Who Delivers It: Licensed clinicians and certified trainers.</p> <p>Delivery Method: Webinars, PD workshops, or custom virtual sessions.</p> <p>Cost: Offered at no cost when included as part of a comprehensive mental health services agreement; custom training packages may be subject to a separate fee if delivered stand-alone or in-person.</p> <p>Technical Assistance & Refresher Training (Standard – No Cost)</p> <p>What's Covered: Ongoing support for system updates, new user onboarding, troubleshooting, and best practice reinforcement.</p> <p>Who Delivers It: eLuma Technical Support and Partner Success Teams.</p> <p>Availability: Year-round, with rapid response during school-year peaks.</p> <p>Cost: Included at no additional charge.</p> <p>eLuma's training programs are designed to ensure that Sourcewell Participating Entities receive the tools, knowledge, and support needed to maximize the impact of virtual mental health services. Most trainings are standard and cost-free, integrated into the implementation process and available on an ongoing basis. Optional sessions allow for deeper staff development and community-wide mental wellness strategies.</p>
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42	Describe any technological advances that your proposed Solutions offer.	<p>Luma delivers advanced, technology-driven mental health and behavioral therapy solutions built specifically for K–12 education. Our proprietary Insight™ platform offers a secure, scalable environment that improves access, simplifies administration, and enhances service delivery for schools and districts nationwide. We continuously invest in innovation to address the evolving needs of educational institutions, particularly Sourcewell Participating Entities.</p> <p>1. Insight™ Platform – Secure, Integrated, and Purpose-Built for Education</p> <p>The Insight™ platform is HIPAA- and FERPA-compliant and designed exclusively for virtual therapy in schools. Key features include:</p> <p>Integrated virtual therapy tools, such as whiteboards, SEL activities, and interactive games to engage students.</p> <p>Real-time progress monitoring, goal tracking, and customizable documentation features for therapists and school administrators.</p> <p>Administrative dashboards that provide visibility into service utilization, student status, and compliance.</p> <p>2. SIS Integration with Schoolday</p> <p>To further streamline implementation and daily operations, eLuma offers Student Information System (SIS) Integration in partnership with Schoolday. This integration allows districts to:</p> <p>Automatically add students from their SIS into the Insight™ platform, eliminating the need for manual entry or bulk uploads.</p> <p>Select students from a real-time SIS roster, filtered by grade or searchable by name.</p> <p>Perform error-checking and validation before processing student data.</p> <p>Enable automatic syncs to regularly update student profiles or archive them upon withdrawal, ensuring accurate, current data across systems.</p> <p>This capability simplifies onboarding, improves data integrity, and reduces administrative burden, especially for large districts or those with dynamic student populations.</p> <p>3. Digital Accessibility and Workflow Efficiency</p> <p>Single Sign-On (SSO) capabilities support secure, seamless logins.</p> <p>Paperless workflows for onboarding, documentation, billing, and reporting.</p> <p>Custom user permissions ensure that educators, therapists, and administrators have appropriate access levels.</p> <p>4. Intelligent Provider Matching & MTSS Support</p> <p>We also leverage a technology-enabled provider matching engine, ensuring students are paired with the best-fit clinicians based on licensing, availability, and area of specialization. Our Insight™ platform supports services across multi-tiered levels (MTSS), from Tier 1 SEL tools to Tier 3 clinical therapy, making it scalable to meet diverse district needs.</p> <p>eLuma's innovative use of technology, including SIS integration, real-time monitoring, digital service tracking, and scalable delivery infrastructure, ensures that Sourcewell Participating Entities can deploy effective, compliant, and data-informed mental health services quickly and efficiently. Our commitment to leveraging smart, education-focused technology helps districts improve student outcomes while easing administrative demands.</p>
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43	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	<p>As a company that delivers the vast majority of its services remotely, eLuma operates with a naturally low environmental footprint, aligning with modern sustainability goals. Our virtual service model significantly reduces emissions associated with commuting, eliminates the need for physical infrastructure, and supports paperless operations through our proprietary Insight™ platform.</p> <p>Additionally, over 95% of eLuma's workforce and clinical service network operate remotely. This model avoids emissions related to employee travel, therapist commuting, and facility energy usage. We reduce thousands of vehicle miles per week that would otherwise be required for in-person therapy and administrative work.</p> <p>All documentation, therapy notes, session logs, billing, and progress reports are securely stored and transmitted digitally via our proprietary Insight™ platform.</p> <p>We encourage digital signatures, online training, and cloud-based communication for all internal and client-facing processes.</p> <p>eLuma utilizes secure, cloud-based systems that are hosted on energy-efficient, scalable platforms (e.g., AWS and Microsoft Azure), which are committed to carbon neutrality and sustainable data center management.</p> <p>The majority of internal staff and client trainings are delivered virtually, reducing the need for air travel, printed materials, and physical meeting spaces.</p>	*
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.	<p>At this time, eLuma does not hold any third-party-issued eco-labels, ratings, or certifications specific to energy efficiency, life-cycle design, or other environmental sustainability factors for the Solutions included in this proposal. However, as a fully virtual service provider, our delivery model naturally supports sustainability by reducing transportation emissions, eliminating paper usage, and minimizing reliance on physical infrastructure. We remain committed to environmentally responsible practices and are actively exploring opportunities to align with recognized green certification programs in the future.</p>	*

45	<p>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?</p>	<p>eLuma offers a distinctive combination of experience, innovation, and flexibility that sets us apart in the virtual behavioral and mental health services industry, particularly as it applies to the needs of Sourcewell Participating Entities.</p> <p>Purpose-Built for Education Unlike general telehealth companies, eLuma is exclusively focused on serving K–12 schools. Our programs, providers, and platform are all designed with the specific needs of students, educators, and school systems in mind, ensuring that services are both educationally relevant and operationally seamless.</p> <p>Scalable, Tiered Service Model Our mental health and behavioral services are delivered through a multi-tiered system of support (MTSS) that includes Tier 1 preventive education, Tier 2 targeted interventions, and Tier 3 clinical therapy—offered virtually. This flexibility allows schools and districts of all sizes to tailor services to their student population's unique and evolving needs. One of eLuma's most valuable differentiators is our ability to offer rapid deployment of services, ensuring that schools and districts can quickly access the support they need without delay. Through our streamlined onboarding process, experienced implementation team, and extensive provider network, we are often able to begin delivering services within days of contract execution. Whether a district is facing unexpected staffing shortages, student crises, or compliance deadlines, eLuma is equipped to respond swiftly and effectively. This agility allows Sourcewell Participating Entities to minimize service gaps, meet urgent student needs, and remain compliant with state and federal requirements, while maintaining a high standard of care and continuity.</p> <p>Proprietary Insight™ Platform Our HIPAA- and FERPA-compliant Insight™ platform was built specifically to support virtual therapy in education. It integrates secure video sessions, documentation, scheduling, communication, and real-time progress monitoring, enabling districts to centralize service delivery while ensuring full transparency and compliance.</p> <p>Extensive Provider Network eLuma has cultivated a large, nationwide network of licensed and credentialed therapists, counselors, and clinicians. This allows us to match providers by licensure, experience, demographics, and cultural competencies, giving schools access to specialized support that would be difficult to source locally.</p> <p>Proven Track Record of Success With over 14 years of experience and more than 400 school districts served across 48 states, including rural, urban, and underserved communities, eLuma has delivered over 38 million therapy minutes to date. We are widely recognized as a top-tier provider in the virtual K–12 mental health space.</p> <p>Partner-Centered Implementation & Support Every new client receives support from a Director of Partner Success, backed by a dedicated Customer Success Partner. Our training, onboarding, and ongoing customer service are designed to ensure a smooth rollout, measurable outcomes, and long-term success.</p> <p>Commitment to Equity and Access Because our services are virtual, there are no geographic limitations. We help districts reduce service gaps, address provider shortages, and extend high-quality support to all students, regardless of location, size, or funding constraints.</p> <p>What makes eLuma's solutions unique is our unwavering focus on student outcomes, our innovative use of technology, and our deep understanding of how to deliver compliant, cost-effective, and customized mental health services in K–12 settings. We're not just a service provider, we're a strategic partner committed to helping Sourcewell Participating Entities build stronger, healthier school communities.</p>
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46	Describe your screening process for pairing service providers with patients or clients for teletherapy services.	<p>Before joining eLuma's provider network, each clinician must pass a thorough, multi-stage screening process, which includes:</p> <p>Verification of Licensure and Credentials for all applicable states and service areas</p> <p>Background and Reference Checks, including work history review</p> <p>Clinical Interviews with our Clinical Services Team to assess therapeutic competency, communication skills, and school-based experience</p> <p>Compliance Review with HIPAA, FERPA, IDEA, and applicable state regulations</p> <p>Technology Proficiency Testing to ensure readiness for virtual service delivery via our Insight™ platform</p> <p>Only candidates with school-based or pediatric clinical experience are selected to support our K–12 partners.</p> <p>2. School and Student Needs Assessment</p> <p>Prior to provider matching, our Partner Success team conducts a detailed consultation with the school or district to understand:</p> <p>Student demographics and population needs</p> <p>Service delivery goals and volume</p> <p>Preferred therapy modalities or areas of specialization (e.g., trauma-informed care, CBT, SEL support)</p> <p>Language or cultural considerations</p> <p>Caseload complexity, schedules, and technology preferences</p> <p>This information informs a precise and customized provider search.</p> <p>3. Intelligent Matching Process</p> <p>We leverage our internal systems and clinical expertise to match providers using the following criteria:</p> <p>Licensure and Availability: Matching therapists who are licensed in the appropriate state and available during needed time slots</p> <p>Specialization and Experience: Aligning providers with student populations based on clinical strengths (e.g., anxiety, behavior disorders, crisis intervention)</p> <p>Cultural, Linguistic, and Demographic Fit: Prioritizing provider-student alignment based on language, identity, and cultural competency when requested</p> <p>District-Specific Requirements: Considering district preferences for schedules, communication, and team integration</p> <p>Districts are invited to review credentials and participate in an introduction before final confirmation.</p> <p>4. Ongoing Oversight and Flexibility</p> <p>After matching, providers are monitored by eLuma's Clinical Leadership Team and Partner Success Managers. We regularly review therapy quality, student engagement, and district satisfaction. If any issues arise or needs change, we quickly respond with alternative matches or support.</p> <p>eLuma's screening and pairing process is designed to ensure every student receives high-quality, personalized support from the right provider, faster and more reliably than traditional staffing models. Our robust vetting, needs assessment, and intelligent matching practices help ensure therapeutic alignment, student progress, and school satisfaction across all Sourcewell Participating Entities.</p>
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47	Describe your method of delivery for proposed teletherapy services (e.g., secure video connection, web portal, online chat, two-way live video, other).	<p>eLuma delivers its mental health and behavioral therapy services through a highly secure, user-friendly virtual environment designed specifically for K–12 education. All services are conducted via live, two-way video conferencing through our proprietary Insight™ platform, which is fully FERPA- and HIPAA-compliant.</p> <p>1. Secure Two-Way Live Video</p> <p>Therapy sessions are conducted in real-time using high-definition, two-way live video between the student and the assigned provider.</p> <p>This format replicates the traditional in-person experience while allowing for flexible scheduling and remote access, ideal for schools facing staffing shortages or geographic barriers.</p> <p>All video connections are encrypted end-to-end to ensure privacy and confidentiality.</p> <p>2. Insight™ Platform – Web-Based Portal</p> <p>Services are delivered through eLuma's Insight™ platform, which is accessible via any standard web browser and requires no software downloads.</p> <p>The platform includes built-in tools to support therapy, such as:</p> <p>Digital whiteboards</p> <p>Interactive SEL activities and games</p> <p>File sharing and screen sharing</p> <p>Session note documentation</p> <p>Students, providers, and school personnel have role-specific logins with appropriate permissions for accessing session history, scheduling, and progress reports.</p> <p>3. Student Engagement and Communication Tools</p> <p>In addition to live video, Insight™ offers supplemental features like:</p> <p>Secure messaging between schools and providers</p> <p>Session alerts and reminders</p> <p>Progress dashboards for administrators to track delivery and student outcomes</p> <p>4. Optional Integrations and Supports</p> <p>SIS Integration (via Schoolday) is available to help districts easily manage student rosters and sync student data automatically.</p> <p>The platform also supports Single Sign-On (SSO) to streamline access for district users.</p> <p>eLuma's method of delivery ensures that every teletherapy session is secure, interactive, and tailored to K–12 educational settings. With our purpose-built Insight™ platform, districts receive a comprehensive, scalable solution for mental health services that is as effective and accessible as in-person care, while offering the added benefits of digital tracking, flexible deployment, and centralized oversight.</p>
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48	Describe how your organization maintains security of patient data and alignment to applicable legal, regulatory, or professional requirements, if any.	<p>Safeguarding the privacy and security of student data is a foundational priority at eLuma. We maintain a rigorous data protection framework aligned with all applicable federal, state, and professional requirements, including the Family Educational Rights and Privacy Act (FERPA) and the Children's Online Privacy Protection Act (COPPA)</p> <p>1. Legal Compliance and Data Collection Protocols</p> <p>eLuma collects student Personally Identifiable Information (PII) solely for the purpose of delivering educational and therapeutic services.</p> <p>In alignment with FERPA, Educational Agencies (EAs) provide consent on behalf of parents to allow eLuma to collect and process student data.</p> <p>For direct student-facing services where applicable, eLuma obtains verifiable parental consent using COPPA-compliant methods.</p> <p>2. Data Ownership and Minimization</p> <p>All student data collected by eLuma remains the sole property of the Educational Agency. eLuma does not claim ownership of any student information.</p> <p>Our data minimization practices ensure that only the necessary information is collected, and data is routinely reviewed and anonymized or deleted when no longer needed.</p> <p>3. Secure Technology Environment</p> <p>eLuma employs robust encryption protocols, both in transit and at rest, to protect student data.</p> <p>Strict access controls are implemented, with access granted only to authorized personnel with a legitimate educational interest.</p> <p>eLuma's Insight™ platform is FERPA- and HIPAA-compliant and includes user-specific permission levels, audit logs, and secure login authentication.</p> <p>4. Vendor Oversight and Third-Party Compliance</p> <p>All third-party vendors that may handle student data on eLuma's behalf are required to meet stringent data privacy and security standards, including encryption, access control, and periodic audits</p> <p>5. Training and Awareness</p> <p>eLuma mandates ongoing data security and privacy training for all employees, including those in Clinical Operations, Customer Success, and Billing, to reinforce compliance and accountability.</p> <p>6. Incident Response and Data Retention</p> <p>In the event of a data breach or security incident, eLuma has defined incident response protocols to ensure immediate investigation, notification, and resolution.</p> <p>Student data is retained only as long as legally required and is deleted within 60 days of contract termination unless otherwise specified by the EA.</p> <p>eLuma is committed to the highest standards of data confidentiality, integrity, and security. Our comprehensive data governance policies ensure that all student information is managed responsibly and in full compliance with FERPA, COPPA, and all relevant educational data privacy regulations. This dedication protects not only the legal interests of Sourcewell Participating Entities but also the trust of the schools, families, and students we serve.</p>
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49	<p>Please describe where and how all user data, including personally identifiable information (PII) and protected health information (PHI), is stored.</p>	<p>At eLuma, the protection of user data, including Personally Identifiable Information (PII) and Protected Health Information (PHI), is a core priority. We have implemented secure, compliant systems and protocols to ensure that all data is safely stored, accessed, and managed in accordance with FERPA, HIPAA, and other applicable regulations.</p> <p>1. Data Storage Location</p> <p>All user data, including PII and PHI, is stored on secure, U.S.-based cloud servers hosted by industry-leading infrastructure providers that comply with:</p> <p>HIPAA Security Rule</p> <p>FERPA requirements</p> <p>SOC 2 Type II certification standards</p> <p>These data centers are physically located within the United States and are governed by strict access control and surveillance systems.</p> <p>2. Data Encryption and Security Protocols</p> <p>Data at Rest: All stored data is encrypted using AES-256-bit encryption, ensuring that even in the event of a breach, data remains unreadable and protected.</p> <p>Data in Transit: All data transmitted between users, systems, and service providers is protected using TLS 1.2 or higher, safeguarding it during login, session activity, and data exchange.</p> <p>3. Access Controls and Authentication</p> <p>eLuma enforces role-based access controls (RBAC) to ensure that only authorized personnel can access sensitive student or health-related data.</p> <p>Multi-factor authentication (MFA) and secure login protocols are in place to prevent unauthorized access.</p> <p>System logs and audit trails are maintained to monitor user activity and detect any anomalies.</p> <p>4. Platform-Specific Safeguards (Insight™)</p> <p>All user interactions take place within eLuma's proprietary Insight™ platform, which is designed to comply with FERPA and HIPAA. The platform features:</p> <p>Encrypted video sessions</p> <p>Secure messaging and documentation</p> <p>Customizable permissions for therapists, administrators, and district personnel</p> <p>5. Data Retention and Deletion Policies</p> <p>eLuma retains user data only for the duration necessary to fulfill educational and therapeutic services.</p> <p>Upon contract termination or upon request by the Educational Agency, data is securely deleted within 60 days, unless otherwise agreed upon in writing.</p> <p>eLuma ensures that all PII and PHI is stored within highly secure, U.S.-based cloud infrastructure, protected by rigorous encryption, access control, and compliance standards. Our practices exceed industry norms and are designed to uphold the trust of our school partners while meeting all applicable legal, regulatory, and professional data privacy requirements.</p>
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50	Describe licensures, degrees, and/or certifications your teletherapy professionals maintain.	<p>We maintain the highest standards for clinical excellence by ensuring that all teletherapy professionals possess the appropriate state licensure, advanced education, and specialized certifications required to deliver mental and behavioral health services in educational settings. All clinicians are vetted and credentialed to comply with federal, state, and local regulatory requirements and are specifically qualified to work in K–12 environments.</p> <p>Required Licensures (Varies by Role and State)</p> <p>Our mental health team includes licensed professionals in the following categories:</p> <p>Licensed Clinical Social Workers (LCSW / LICSW / LMSW)</p> <p>Licensed Professional Counselors (LPC / LPCC / LCPC)</p> <p>Licensed Mental Health Counselors (LMHC)</p> <p>Licensed Psychologists (PhD, PsyD)</p> <p>Licensed School Social Workers and School Psychologists</p> <p>Each provider holds active licensure in the states where services are delivered and complies with teletherapy regulations established by state licensing boards and education agencies.</p> <p>Educational Background</p> <p>All clinicians hold master's or doctoral degrees in relevant disciplines, such as:</p> <p>Social Work (MSW)</p> <p>Counseling Psychology (MA, MEd, MS)</p> <p>Clinical Psychology (PhD, PsyD)</p> <p>School Psychology or Educational Psychology (EdS, PsyS)</p> <p>Degrees are obtained from accredited institutions and meet the requirements for professional licensure and credentialing in school-based practice.</p> <p>Certifications and Specializations</p> <p>In addition to licensure and academic training, many of our providers hold specialized certifications, including:</p> <p>Trauma-Informed Care Certification</p> <p>Cognitive Behavioral Therapy (CBT) Training</p> <p>Dialectical Behavior Therapy (DBT) Certification</p> <p>Crisis Prevention and Intervention (CPI)</p> <p>SEL-focused certifications (e.g., CASEL-aligned programming)</p> <p>Culturally Responsive Teaching and Therapy Training</p> <p>Ongoing professional development and continuing education provided to clinicians, and eLuma supports regular training to maintain clinical effectiveness and school-based relevance.</p>
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51	Describe how you ensure service quality and continuity in cases of connectivity issues or technology failures.	<p>We are committed to delivering consistent, high-quality teletherapy services regardless of location or circumstance. Recognizing that technology disruptions can occasionally occur in virtual environments, we have implemented a multi-layered continuity plan to ensure minimal service interruption and reliable support for all students, educators, and districts.</p> <p>Resilient Technology Infrastructure</p> <p>eLuma's Insight™ platform is a cloud-based, secure, and reliable system hosted in U.S.-based Tier 1 data centers with high uptime guarantees and redundant infrastructure to minimize outages.</p> <p>Regular platform performance monitoring is conducted to identify and resolve issues before they impact users.</p> <p>Real-Time Support and Troubleshooting</p> <p>We offer real-time technical support during all therapy hours to immediately assist therapists, students, or staff in the event of platform access issues or video/audio disruption.</p> <p>Our support team can diagnose and resolve issues live via chat, email, or phone.</p> <p>A built-in "Help" button within Insight™ allows users to submit tickets or connect to support seamlessly during sessions.</p> <p>Backup Communication and Session Recovery</p> <p>If a session is disrupted:</p> <p>The therapist will immediately contact the student or school staff via email or phone to reschedule or resume using alternate methods.</p> <p>Session documentation tools preserve all session data in real-time, so no progress is lost if a session is interrupted.</p> <p>Our therapists are trained in session continuity protocols, including how to transition to phone-based interventions when needed.</p> <p>Rescheduling and Make-Up Session Flexibility</p> <p>eLuma provides flexible make-up session options at no additional charge in the event a session is lost due to technical failure on our end.</p> <p>Districts can use Insight's scheduling tools to quickly coordinate rescheduling in collaboration with their assigned Partner Success Manager.</p> <p>Pre-Session Tech Checks and Support for End-Users</p> <p>Prior to onboarding, schools and staff receive technology setup guidelines and testing protocols to prevent local issues.</p> <p>Our team works with IT departments to ensure optimal setup for firewalls, bandwidth, and device compatibility.</p> <p>Students can access pre-session tech check guides to ensure camera, audio, and connectivity are functional before a live session.</p> <p>In 2025, eLuma's clinicians achieved a 97% session attendance rate, reflecting our strong commitment to reliability and consistent service delivery.</p>
52	What accessibility features are included to accommodate users with disabilities (e.g., closed captioning, screen readers, adaptive interfaces)?	<p>eLuma's Insight™ platform is built for accessibility, supporting screen readers, keyboard navigation, adjustable display settings, and closed captioning upon request. Our therapists are trained in universal design and adapt sessions to meet IEP or 504 Plan needs. Bilingual support and interpreter services are also available. With personalized accommodations and built-in accessibility tools, we ensure all students can fully participate in therapy.</p>
53	Do you offer multilingual support to cater to diverse populations? If so, please explain.	<p>Yes, eLuma offers comprehensive multilingual support to ensure equitable access to mental health and therapy services for diverse student populations. We currently accommodate 36 different languages, enabling us to serve students and families from a wide range of linguistic and cultural backgrounds.</p>

54	If applicable, how does your solution leverage AI to enhance your behavioral health platform and service delivery?	<p>Yes, eLuma is actively integrating AI-powered tools to enhance our behavioral health platform and improve service delivery outcomes for students and districts. Through our partnership with SchoolDay, we leverage AI-driven well-being analytics to support early identification of student mental health needs. The system collects and interprets anonymized student feedback to generate real-time insights on emotional well-being, stress, engagement, and sense of belonging. These insights help districts prioritize resources, identify at-risk students, and track progress over time.</p> <p>Additionally, eLuma is exploring AI to support:</p> <p>Workflow automation for improved scheduling, documentation, and therapist matching.</p> <p>Predictive analytics to optimize staffing models and service delivery.</p> <p>Enhanced provider support tools, such as intelligent session note prompts and real-time compliance checks.</p> <p>While all AI components are used in conjunction with licensed clinicians and staff, our approach ensures responsible implementation that enhances, rather than replaces, the human-centered nature of care. As technology evolves, we remain committed to adopting innovations that uphold privacy, equity, and evidence-based practices.</p>
55	What licenses do you have and for which states?	<p>eLuma partners exclusively with fully licensed mental health and behavioral health providers who are credentialed to practice in the states they serve. We maintain a nationwide network of clinicians who collectively hold active licenses in all 50 U.S. states, ensuring full compliance with state-specific regulations and credentialing requirements. This broad licensure coverage allows us to deliver services seamlessly across the country and ensures that all students receive support from qualified professionals authorized to practice in their respective jurisdictions.</p>
56	Describe your AI capabilities and related security measures.	<p>eLuma integrates AI tools to enhance service delivery through wellness analytics, provider matching, and workflow automation, always under human supervision. All AI features operate within FERPA- and HIPAA-compliant systems, using encrypted, anonymized data to ensure privacy and security. We conduct regular audits and maintain strict access controls, ensuring our AI solutions support care without compromising confidentiality or compliance.</p>

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 type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
58		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
59		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
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 type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
64		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*
65		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A	*

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.	<p>eLuma offers flexible payment terms to meet the varying needs of school districts and educational agencies. Standard payment terms are Net 30, but we are open to alternative arrangements based on district preference. Districts may choose to be invoiced on a monthly or annual basis.</p> <p>We accept the following payment methods:</p> <p>Purchase Orders (POs) – submitted via email to billing@elumatherapy.com</p> <p>Check Payments</p> <p>ACH/Electronic Bank Transfers</p> <p>Credit Card Payments (if preferred and approved)</p> <p>Invoices can also be made available directly within our Insight™ platform for convenient access and tracking.</p> <p>Our billing team works closely with each district to ensure a smooth, transparent, and timely invoicing process.</p>	*

67	Describe any leasing or financing options available for use by educational or governmental entities.	N/A	*
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.	<p>We use a set of standard transaction documents to ensure clarity, transparency, and alignment with each participating entity's needs. These documents include:</p> <p>Master Service Agreement (MSA): Outlines the general terms and conditions governing the partnership, including compliance with FERPA, HIPAA, and relevant state education laws.</p> <p>Service Level Agreement (SLA): Defines service expectations, including therapist availability, session delivery standards, and response times for support inquiries.</p> <p>Order Form/Scope of Work (SOW): Customizable to each district, this document details the specific services to be provided, number of students, provider types, and contract term.</p> <p>Business Associate Agreement (BAA): When applicable, this document outlines privacy and security obligations regarding protected health information (PHI).</p> <p>Invoice Template and Billing Summary: Provided with each billing cycle, showing a breakdown of services rendered and applicable charges.</p>	*
69	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	Yes, eLuma accepts the P-card procurement and payment process. There is no additional cost to Sourcewell participating entities for using this method of payment.	*
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 Sourcewell discounted price) on all of the items that you want Sourcewell 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.	<p>eLuma offers a straightforward, transparent pricing model based on fixed service rates. Our pricing does not include line-item or product-category discounts, as we maintain consistent hourly and per-evaluation rates across services to ensure simplicity and cost predictability for Sourcewell participating entities. All prices represent our standard rates, which will also serve as our Sourcewell pricing. There are no additional fees or hidden costs associated with our services, and we do not charge extra for administrative support, onboarding, or technology use.</p> <p>eLuma does not currently offer additional discounts or promotional pricing beyond the standard rates listed above. All services are delivered virtually and tailored to the specific needs of each school or district partner.</p>	*
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.	eLuma's pricing proposal reflects our standardized, transparent pricing model for virtual-only mental health services. Our rates are consistent nationwide and are not based on Manufacturer's Suggested Retail Price (MSRP) or list pricing. Therefore, there is no percentage discount applied, as the pricing listed already represents our standard, non-discounted virtual service rates.	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	N/A	*
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.	N/A	*
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.	<p>There are no additional elements of the total cost of acquisition beyond the pricing submitted with this response. Because eLuma exclusively provides virtual services, there are no charges related to freight, shipping, pre-delivery inspection, physical installation, equipment setup, or on-site training.</p> <p>All necessary components to deliver services, such as provider onboarding, platform access (if applicable), documentation, virtual setup support, and ongoing technical assistance, are included in the standard pricing. No third-party vendors impose additional fees, and there are no hidden or supplemental costs associated with our virtual service delivery model.</p>	*
75	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	N/A	*

76	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	N/A	*
77	Describe any unique distribution and/or delivery methods or options offered in your proposal.	N/A	*
78	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	Sourcewell rates are programmed into our billing system, and each invoice undergoes review by both a Customer Success Partner and finance team member. Monthly audits and quarterly compliance checks confirm rate accuracy and entity eligibility. All invoices are itemized for transparency, and any concerns are promptly resolved through our dedicated support channels.	*
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.	If awarded, eLuma will track key internal metrics such as: number of participating Sourcewell entities, service utilization rates, customer satisfaction scores, contract renewal rates, and service delivery timelines. These indicators will help us evaluate impact, ensure quality, and identify opportunities for continuous improvement.	*
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.	eLuma proposes a 2% Administrative Fee payable to Sourcewell on all completed transactions conducted through this Master Agreement. This fee will be calculated as 2% of the total value of each completed transaction with participating entities during the defined reporting period.	*

Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments	
81	The pricing offered is consistent with standard market pricing typically offered to individual municipalities, universities, or school districts.	<p>Unlike lower-cost models that may compromise quality or continuity, our pricing ensures access to highly qualified, licensed professionals who are experienced in school-based service delivery and compliance.</p> <p>Every dollar spent includes more than direct service, it supports a robust infrastructure of clinical supervision, customer success, compliance oversight, and technical support, all of which are critical to ensuring consistent outcomes and minimizing district risk. Additionally, we include a complimentary Special Education Needs Assessment for each participating district, empowering schools to proactively identify gaps, optimize resources, and better serve students. This holistic approach delivers exceptional value and long-term sustainability, making eLuma not just a provider, but a trusted partner in student success.</p>	*

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	eLuma offers a full suite of virtual mental, behavioral, and special education therapy	

Solutions offered, including used Solutions if applicable, offered in the proposal.

services tailored exclusively to the needs of K–12 students and schools. Our services are delivered through our proprietary Insight™ platform, which provides secure, FERPA- and HIPAA-compliant teletherapy capabilities, scheduling, documentation, and communication tools. All services are delivered by fully licensed professionals across all 50 U.S. states.

1. Virtual Mental Health Counseling

Individual Counseling: One-on-one therapy for students addressing anxiety, depression, trauma, grief, stress, and other emotional or behavioral challenges.

Group Counseling: Targeted group sessions for students with shared needs (e.g., coping skills, social-emotional learning, peer relationships).

Tier 2 & Tier 3 Interventions: Support for at-risk students and those with more intensive mental health needs, aligned with MTSS frameworks.

2. School Psychology Services

Psychoeducational Evaluations: Virtual assessments to identify learning disabilities, emotional disturbance, ADHD, and more.

Consultation & IEP Participation: School psychologists collaborate with staff, participate in IEP/ARD meetings, and support FAPE and IDEA compliance.

Behavioral Interventions & Support Plans (BIPs, FBAs): Delivered in coordination with school teams to address challenging behaviors.

3. Licensed Clinical Social Work Services

Mental Health Counseling: Provided by LCSWs experienced in school-based interventions.

Home-School Collaboration: Family support, resource referrals, and caregiver engagement.

Crisis Response & Prevention Services: Helping schools manage acute student mental health needs.

4. Special Education & Related Services

Speech-Language Therapy: Comprehensive speech therapy delivered virtually by licensed SLPs, including bilingual services.

Occupational Therapy (OT): Support for fine motor skills, sensory integration, and ADLs via virtual sessions adapted for K–12.

Social Work & Counseling Services under IEPs: Delivered in alignment with student goals and state-specific requirements.

5. Self-Guided & Supplemental Tools

SEL Resources & Activities: Curated tools aligned with CASEL standards and designed for independent use by students.

Progress Monitoring & Documentation Tools: Built into the Insight™ platform for educators and administrators.

Wellness Surveys & AI-Powered Check-Ins: In partnership with SchoolDay, eLuma provides student wellness dashboards to proactively identify needs.

6. Technology Platform – Insight™

Secure, Web-Based Platform: No downloads required; accessible via any internet-enabled device.

Live Scheduling, Session Logging, & Therapist Communication

SIS Integration: Streamlined student data management and syncing.

Accessibility Features: Screen reader support, closed captioning (on request), and multilingual support in over 36 languages.

7. Service Delivery Models

Direct-to-Student Sessions: Real-time therapy during the school day.

		<p>Consultation & Collaboration: Support for teachers, staff, and caregivers.</p> <p>Flexible Billing: Annual or monthly invoicing, with Insight-integrated invoicing and PO submission available.</p> <p>All of eLuma's solutions are developed specifically for K–12 settings, and designed to be scalable, evidence-based, and compliant with all legal and regulatory standards. Whether districts need full-time providers, supplemental coverage, or targeted interventions, eLuma offers a flexible and complete virtual solution to improve student mental health, behavior, and learning outcomes.</p>
83	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Virtual Mental Health Counseling</p> <p>School Psychology Services</p> <p>Behavioral Health Therapy</p> <p>Licensed Clinical Social Work Services</p> <p>Speech-Language Pathology (SLP) Services</p> <p>Occupational Therapy (OT) Services</p> <p>Social-Emotional Learning (SEL) Supports</p> <p>Psychoeducational Evaluations</p> <p>Crisis Response and Prevention</p> <p>IEP-Based Related Services</p> <p>Multilingual and Bilingual Therapy Services</p> <p>K–12 Teletherapy Technology Platform</p> <p>MTSS and Tiered Intervention Support</p> <p>Parent and Educator Consultation Services</p>

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	We only serve K-12 at this time.	*
85	Psychology, Social work, or Special Education Services	<input type="radio"/> Yes <input checked="" type="radio"/> No		
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		
87	Crisis support, suicide prevention	<input type="radio"/> Yes <input checked="" type="radio"/> No		
88	Assessment or diagnostic services	<input type="radio"/> Yes <input checked="" type="radio"/> No		
89	Category 2: Public Safety Employees, if yes answer 90-93	<input type="radio"/> Yes <input checked="" type="radio"/> No	We only serve K-12 at this time.	*
90	Psychology or Social work	<input type="radio"/> Yes <input checked="" type="radio"/> No		
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 type="radio"/> Yes <input checked="" type="radio"/> No		
92	Crisis support, suicide prevention	<input type="radio"/> Yes <input checked="" type="radio"/> No		
93	Assessment or diagnostic services	<input type="radio"/> Yes <input checked="" type="radio"/> No		
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	eLuma exclusively serves K-12 students and faculty. We do not provide services to higher education institutions. Our programs, including speech, occupational therapy and mental health are specifically designed for the needs, schedules, and compliance requirements of K-12 students.	*
95	Psychology, Social work, or Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Our licensed professionals include school psychologists, social workers, and special education specialists who deliver virtual assessments, counseling, behavioral support, and direct services tailored to K-12 students' needs.	*
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	Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs	*
97	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No		
98	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No		
99	Speech	<input checked="" type="radio"/> Yes <input type="radio"/> No		
100	Occupational Therapy	<input checked="" type="radio"/> Yes <input type="radio"/> No		

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

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcewell have been incorporated into the contract text.

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](#) - eLuma Pricing .pdf - Monday July 21, 2025 15:36:07
 - [Financial Strength and Stability](#) - eLuma Financial Statements Final PDF.pdf - Monday July 21, 2025 14:40:37
 - Marketing Plan/Samples (optional)
 - WMBE/MBE/SBE or Related Certificates (optional)
 - [Standard Transaction Document Samples](#) - Sample Itemized Invoice-1.pdf - Monday July 21, 2025 14:44:55
 - Requested Exceptions (optional)
 - [Upload Additional Document](#) - eLuma Summary - Sourcewell.pdf - Monday July 21, 2025 14:54:44

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. - Kami Bible , Clinical Services Manager , eLuma, 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