



MASTER AGREEMENT #072225
CATEGORY: 3 – Virtual Behavioral Health Therapy and Related Services
SUPPLIER: Protocall Services Inc.

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 Protocall Services, Inc., 5200 S. Macadam Ave., #310, Portland, OR 97239 (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

Sourcwell 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.** Sourcwell 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.** Sourcwell 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 Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may

request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.

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

12) Supplier Representations:

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

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

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

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

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

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

i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935,

3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of "funding agreement" under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit

organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

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

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

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

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

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

- x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.
- xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.
- xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and

Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

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

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

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

Article 2: Sourcewell and Supplier Obligations

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

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

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

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
 - Maintenance and management of this Agreement;
 - Timely response to all Sourcewell and Participating Entity inquiries; and
 - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

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

The Report must contain the following fields:

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

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

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

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee of two percent (2%) to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master

Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.

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

- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 19) **Grant of License.**
- a) **During the term of this Agreement:**
 - i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.
 - ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.
 - b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.
 - c) **Use; Quality Control.**
 - i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
 - ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.
 - d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and

promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

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

- d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.
- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.
- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

Article 3: Supplier Obligations to Participating Entities

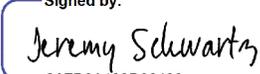
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject,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

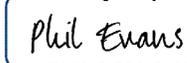
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.

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

Sourcewell

Protocall Services, Inc.

Signed by:

 By: _____
 Jeremy Schwartz
 Title: Chief Procurement Officer
 Date: 10/31/2025 | 8:25 PM CDT

DocuSigned by:

 By: _____
 Aarti Khullar
 Title: VP of Education Solutions
 Date: 10/31/2025 | 1:49 PM PDT

RFP #072225 - Virtual Behavioral Health Therapy and Related Services

Vendor Details

Company Name: Protocall Services
Address: 5200 S Macadam Avenue
Suite 310
Portland, OR 97239
Contact: Aarti Khullar
Email: aarti.khullar@protocallservices.com
Phone: 312-590-8699
HST#: 911829097

Submission Details

Created On: Wednesday July 09, 2025 12:02:01
Submitted On: Tuesday July 22, 2025 12:47:46
Submitted By: Aarti Khullar
Email: aarti.khullar@protocallservices.com
Transaction #: ab702e65-52a9-4231-9ce2-005e08b1b35d
Submitter's IP Address: 147.243.189.7

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.	Protocall Services, Inc.
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	Togetherall
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE 1XBE2
5	Provide your NAICS code applicable to Solutions proposed.	624190
6	Proposer Physical Address:	5200 S Macadam Ave #310, Portland, OR 97239
7	Proposer website address (or addresses):	https://protocallservices.com/ https://welltrack.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):	Aarti Khullar, VP of Education Solutions, 5200 S Macadam Ave #310, Portland, OR 97239, aarti.khullar@protocallservices.com, 315-557-8285
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Aarti Khullar, VP of Education Solutions, 5200 S Macadam Ave #310, Portland, OR 97239, aarti.khullar@protocallservices.com, 315-557-8285
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	n/a

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

Line Item	Question	Response *
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	<p>Founded in 1992 as a division of Metro Crisis Intervention Services in Portland, Oregon, Protocall was established to improve access to 24/7 crisis intervention and intake services. In 1997, we transitioned to a privately held S-Corporation, owned and led by President and CEO Phil Evans, a leader committed to clinical excellence over rapid investor-driven expansion.</p> <p>Our larger leadership team brings firsthand experience in higher education mental health. Dr. Aarti Khullar, VP of Education Solutions, has been in your shoes—as a former university psychologist, she understands the challenges, issues, and hurdles institutions face in delivering student mental health services. Her experience directly informs Welltrack's education program, ensuring that our solutions are designed to align with the realities of campus mental health care. In addition to her leadership at Welltrack, Dr. Khullar founded one of the core solutions that now lives within the Welltrack ecosystem, demonstrating her deep commitment to creating tools that truly serve universities and students alike.</p> <p>Today, Welltrack by Protocall serves over 400 higher education institutions, helping colleges and universities expand their mental health resources, enhance student retention, and provide immediate crisis support.</p> <p>A Proven Partner with a Track Record of Success:</p> <p>Welltrack is a trusted, long-term partner for higher education institutions nationwide. Our commitment to continuous improvement is reflected in industry-leading satisfaction metrics:</p> <ul style="list-style-type: none"> -Net Promoter Score (NPS) of +64.5 – Nearly double the behavioral healthcare industry average of 34. -91% Client Renewal Rate – Demonstrating the lasting impact of our services. -Customer Support Rating: 4.7 out of 5 – Reinforcing our commitment to service excellence. <p>With an average tenure of over six years per higher education partner, Welltrack is dedicated to building sustainable, long-term relationships. Many of our partnerships originate from direct referrals, underscoring the trust and confidence college and university leaders place in our services.</p> <p>By selecting Welltrack, universities gain a trusted mental health partner with a history of exceptional customer satisfaction, institutional trust, and continuous service innovation. Our ability to listen, adapt, and provide high-quality care ensures that students receive the support they need to succeed—without the burden of navigating mental health challenges alone.</p>	*
12	What are your company's expectations in the event of an award?	To be compensated financially in exchange for providing services.	*
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.	2024 Financial statements attached in document upload section.	*
14	What is your US market share for the Solutions that you are proposing?	Welltrack HelpNow: 430 university customers Welltrack Connect: 71 university customers Welltrack Boost: 55 university customers Togetherall: 205 university customers	*
15	What is your Canadian market share for the Solutions that you are proposing?	Welltrack HelpNow: 0 university customers Welltrack Connect: 0 university customers Welltrack Boost: 1 university customer Togetherall: 21 university customers	*
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.	<p>Protocall Services confirms that it is not currently, nor has it been within the past seven years, involved in any bankruptcy proceedings. Protocall will provide prompt written notice to Sourcewell if it enters into a bankruptcy proceeding at any point during the pendency of this RFP evaluation.</p> <p>Togetherall also confirms that it is not currently, nor has it been within the past seven years, involved in any bankruptcy proceedings. Togetherall will provide prompt written notice to Sourcewell if it enters into a bankruptcy proceeding at any point during the pendency of this RFP evaluation.</p>	*

17	How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?	Protocall is best described as a service provider. Our sales and service force are employees of Protocall. We do not have a dealer network.	*
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.	Accreditation from the American Association of Suicidology, accreditation with CARF (Commission on Accreditation of Rehabilitation Facilities) for Crisis and Information Call Centers: Integrated: AOD/MH (Adult), licensure in the state of Washington as a Behavioral Health Agency, and our HITRUST Certification. Additionally, Protocall has been an affiliated crisis center with the National Suicide Prevention Lifeline (NSPL) since 2014.	*
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.	Protocall Services confirms that it is not currently, nor has it been within the past seven years, subject to any debarment or suspension. Protocall will provide prompt written notice to Sourcwell if it becomes subject to debarment or suspension at any point during the pendency of this RFP evaluation.	*
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	Our dual accreditation by the American Association of Suicidology (AAS) and CARF (the Commission on Accreditation of Rehabilitation Facilities) further underscores our commitment to the highest levels of clinical quality, safety, and accountability. Welltrack has been HITRUST Certified since 2018 and is currently undergoing recertification. We are also participating in a HITRUST/StateRAMP pilot, with StateRAMP certification expected by mid-2025—aligning us with government-level security standards rarely matched in student mental health services.	*
21	What percentage of your sales are to the governmental sector in the past three years?	n/a	*
22	What percentage of your sales are to the education sector in the past three years?	Over the past three years, 71% of our sales have been to the education sector.	*
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?	Includes 2023, 2024, and 2025 (year to date): MHEC (Massachusetts Higher Education Consortium): \$68,000 UNC System: \$959,000 University of Nebraska System: \$103,000 Washington State University System: \$153,000 UMass System: \$492,000	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	Protocall does not have any GSA contracts or Standing Offers and Supply Arrangements.	*

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 *	
University of Houston	Dr. Monica Lackups	713-743-5454	*
University of Massachusetts Boston	Dr. Bill Defranc	617-797-1147	*
Western Washington University	Cynthia Swanlund, Psy.D.	360-650-3164	*

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

Describe your company’s capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your

response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
26	Sales force.	Protocall's higher education sales force consists of the following personnel: Dr. Aarti Khullar, VP of Education Solutions (direct employee) Tony Krezinski, Director of Sales and Implementation (direct employee) Emily Pettit, Director of Campus Growth and Engagement (direct employee) Erin Hayes, Sales Manager (direct employee) Hardy McCall, Director of Education Solutions (contractor) Phil Evans, Chief Executive Office (direct employee)
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	n/a
28	Service force.	Protocall's higher education service force consists of the following personnel: Dr. Aarti Khullar, VP of Education Solutions (direct employee) Emily Pettit, Director of Campus Growth and Engagement (direct employee) Sara Forist, Director of Self Help and Wellness Services (direct employee) Michelle Adamski, Director of Partner Services Heather Wenz, Manager of Customer Success Gabrielle Bickersteth, Partner Services Manager Asa Forsythe, Manager of Commercial Operations Derek Lovegreen, Senior Relationship Manager (direct employee) Maggie Sawyer, Senior Relationship Manager (direct employee) Shannon Janito, Relationship Manager (direct employee) Maggie Sawyer, Senior Relationship Manager (direct employee) Katy Humphries, Relationship Manager (direct employee) Alix Twyman, Relationship Manager (direct employee) Melody Spaulding, Relationship Manager (direct employee) Imani Byers-Quarterman, Relationship Manager (direct employee) Brittani Bailey, Care Relationship Associate (direct employee) Sarah Buckmaster, Care Relationship Associate (direct employee) Eugenia Smith, Care Relationship Associate (direct employee) Melenie Barbee, Care Relationship Associate (direct employee)
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	The ordering process will be handled by the proposer. Protocall's sales process is designed to ensure that prospective buyers fully understand the products we offer and the benefits they can expect. We begin with a 30–60 minute consultation where we explain product features, provide live demonstrations, and answer any questions. We work closely with buyers to determine which of our ecosystem solutions best fit their needs. Uniquely, our solutions can be purchased in any combination, allowing institutions to create a custom ecosystem set to fit their specific needs and budgets. We are flexible in engaging with either a single representative, such as a Director of Counseling, Vice President of Student Affairs, or the entire department. Further, we are happy to join as many follow-up calls as needed to support their decision-making process. To supplement these conversations, we provide a detailed sales proposal document that gives institution staff and stakeholders in-depth information about our solutions. We can also offer demo accounts to staff, allowing them to explore the product firsthand at their convenience.

30	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>Our customer service program is designed to ensure a seamless and supportive experience from the moment the sales process concludes. Unlike many organizations, we do not hand customers off to a separate team once they have onboarded with us. Instead, clients continue working directly with the VP of Education Solutions and the Director of Campus Growth and Engagement to maintain continuity and ensure there is no disconnect between the expectations set during the sales process and the ongoing customer experience. This approach allows us to build stronger partnerships and provide personalized support every step of the way.</p> <p>Our team provides regular instruction on how to get the most out of our products, including onboarding our customers' new employees, troubleshooting, and offering demonstrations. A dedicated relationship manager handles customer service issues, responding to inquiries within 1-2 business days. Beyond technical support, we offer a range of post-sale services such as communicating product updates, collaborating with student groups to increase awareness, assisting with student engagement at population level and digital communication strategies, creating tailored orientation programs for incoming freshmen, and producing personalized print and digital collateral. We also help onboard additional university departments—such as health promotion, health services, care/case management teams, and student affairs—that were not part of the initial buying process but can benefit from the product. This comprehensive engagement approach is intended to help embed positive mental health and well-being services campuswide. We are committed to a strategic relationship with our education partners to ensure we can maximize engagement and success across the entire campus community.</p>	*
31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	We are able and willing to provide services to higher education and secondary education institutions, as long as the users of our product are aged 13 or over.	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	We are able and willing to provide services to higher education and secondary education institutions in Canada, as long as the users of our product are aged 13 or over.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	n/a (we can serve all geographic areas of the United States and Canada)	*
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.	This proposal is intended for secondary education and higher education institutions only. Participating entities that do not fit into one of those categories will not have access.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	There are no restrictions for entities in Hawaii, Alaska, or US Territories.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes.	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *
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<p>37</p>	<p>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>	<p>Welltrack by Protocall’s marketing approach is purpose-built to engage both the procurement and behavioral health clinical decision-makers within educational institutions. As a long-standing provider of behavioral health services to over 400 colleges and universities, we specialize in targeted B2B outreach for higher education and secondary education institutions. If awarded a Sourcewell contract, we would activate a multi-tiered marketing strategy to promote this opportunity nationally and drive adoption across eligible members.</p> <p>1. Targeted B2B Sales Outreach to Educational Institutions</p> <p>Our primary customers are higher education institutions, and we market to them through a highly targeted B2B sales process—focusing on decision-makers in student affairs, counseling services, and health promotion. (See uploaded sales proposal examples for reference.)</p> <p>To expand awareness and utilization of the Sourcewell contract:</p> <ul style="list-style-type: none"> • We will implement a dedicated outreach campaign to Sourcewell members, identifying contract benefits and streamlining the procurement journey. • We will tailor outreach based on institutional type (community colleges, regional universities, K-12 districts), with messaging focused on how peer institutions have deployed the Welltrack Ecosystem to reduce student mental health risks and enhance retention. <p>2. Thought Leadership Webinars Featuring Peer Institutions</p> <p>Protocall holds quarterly thought leadership webinars focused on behavioral health in education. If awarded this opportunity, we will expand this model by:</p> <ul style="list-style-type: none"> • Hosting webinars tailored to Sourcewell members, co-led by institutional stakeholders who have successfully implemented Welltrack services. • Presenting real-world case studies and impact data on student well-being and retention. • Inviting both current Sourcewell members and prospective ones to attend, with follow-up material provided digitally. <p>3. Digital Campaigns and Email Outreach</p> <ul style="list-style-type: none"> • Targeted marketing emails to Sourcewell-eligible prospects and leads, offering case studies, purchasing guides, and implementation success stories. • Social media campaigns featuring testimonials and outcome data from institutions similar to those in the Sourcewell network. <p>4. Conference Participation and Promotion</p> <p>Protocall will promote the Sourcewell partnership at key educational conferences by:</p> <ul style="list-style-type: none"> • Sponsoring and presenting at both national and regional conferences such as NASPA, ACHA, AUCCCD. • Hosting Sourcewell-focused breakout sessions and “contracting made simple” guides for procurement leaders. <p>5. Campus-Level Promotion to Drive Student Engagement</p> <p>Once a university or school district becomes a customer under Sourcewell, our focus shifts to consumer-facing promotion to drive student usage of our mental health tools. We support institutional adoption with:</p> <ul style="list-style-type: none"> • Design and delivery of print and digital marketing collateral to distribute across campus (see samples in the Document Upload section). • Collaboration with student groups to raise awareness and peer endorsement. • Custom email templates and campaigns drafted with Student Affairs and Counseling departments. • Integration of Welltrack services into orientation programming, academic support services, residential living, and athletics, will help ensure that first year students in particular know to get help immediately in their new campus community. • Outreach through other departments, such as Health Promotion or Care Management, Student Success and Academic Support to further expand visibility and access will ensure our services are readily accessible to all students.
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<p>38</p>	<p>Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.</p>	<p>At Welltrack by Protocall, we take a data-driven approach to marketing—leveraging modern digital tools, analytics platforms, and behavioral insights to optimize our outreach to educational institutions and maximize engagement with students. Our use of technology allows us to deliver highly targeted, measurable, and responsive campaigns that support awareness and utilization of our mental health solutions across higher education and K–12 markets.</p> <p>1. Customer Relationship Management (CRM) and Behavioral Tracking We utilize a robust CRM system to manage outreach across the higher education and secondary education landscape. Key features include:</p> <ul style="list-style-type: none"> • Segmentation by role and institution type, allowing us to target messaging to deans, student affairs leaders, and counseling center directors. • Tracking email opens, click-throughs, and engagement history, enabling lead scoring and re-targeting based on behavioral patterns. • Campaign automation, allowing for drip campaigns and triggered messaging tailored to key moments in the academic calendar (e.g., orientation, mental health awareness month, midterms, finals, and academic holidays). <p>2. Social Media and Retargeting Campaigns Welltrack uses social media platforms—particularly Instagram—to:</p> <ul style="list-style-type: none"> • Promote institutional success stories and mental health trends to student users. • Amplify webinar invitations and contract announcements (including Sourcewell availability). <p>3. Metadata, SEO, and SEM Integration To ensure discoverability and optimize inbound traffic, we anticipate implementing the following:</p> <ul style="list-style-type: none"> • Structure web content and campaign pages with schema.org metadata, which enhances visibility in search engine results and improves rich snippet performance. • Use search engine marketing campaigns tied to high-intent keywords to support targeted communication to our key purchasers. <p>4. Data Analytics and Reporting We employ real-time dashboards to monitor campaign performance and adjust strategy dynamically. Metrics tracked include:</p> <ul style="list-style-type: none"> • Email open/click rates • Webinar registrations and attendance • Download data for promotional collateral (on-demand webinars, case studies - coming soon) • Social engagement (likes, shares, mentions, follows) • Institutional inquiries tied to Sourcewell promotion <p>These insights inform A/B testing of subject lines, visuals, content formats, and platform targeting to improve conversion rates across campaigns. By combining sophisticated CRM workflows, social engagement strategies, metadata optimization, and real-time analytics, Protocall ensures that our marketing efforts are both evidence-informed and outcomes-focused—maximizing value to both institutional buyers and the students they serve.</p>
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39	<p>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>	<p>We view Sourcewell as a strategic partner in expanding access to high-quality, competitively awarded contracts for public and nonprofit education institutions. Sourcewell plays a key role in:</p> <ul style="list-style-type: none"> • Providing procurement validation and credibility that shortens purchasing timelines and reduces administrative burdens for schools, colleges, and universities. • Amplifying contract visibility through its online contract directory, member communications, and targeted promotions across public sector networks. • Driving contract awareness among purchasing officials and facilities administrators who may not yet be familiar with behavioral health solutions in general. <p>We believe Sourcewell's ability to endorse, promote, and distribute awarded agreements enhances the effectiveness of vendors' outreach efforts—especially when paired with a strong vendor-side marketing and sales strategy.</p> <p>Should Protocall be awarded a Sourcewell agreement, we will fully integrate it into both our US and Canada sales operations and client success workflow to ensure maximum adoption and benefit to member institutions.</p> <ol style="list-style-type: none"> 1. Contract Enablement for Sales & Client Success Teams <ul style="list-style-type: none"> • We will train our national higher education and secondary education sales teams on how to leverage the Sourcewell contract to expedite purchasing decisions. • Sales representatives will be equipped with contracting guides, and FAQs to answer procurement-specific questions. • Our CRM system will be updated to tag Sourcewell-eligible prospects and track engagements related to cooperative purchasing benefits. 2. Dedicated Sourcewell Sales Support <ul style="list-style-type: none"> • We will assign a Sourcewell Liaison within our Business Development team to serve as an internal expert and point person for all Sourcewell-related opportunities. • This individual will support regional reps, respond to contract inquiries, and update Sourcewell on sales and marketing efforts. 3. Prominent Inclusion in Sales and Marketing Materials <ul style="list-style-type: none"> • The Sourcewell contract will be featured on our website, in email campaigns, webinars, and printed sales materials to highlight its availability as a compliant procurement pathway. • In all RFP responses and proposals to education institutions, we will reference the contract as an optional procurement mechanism to expedite engagement. 4. Support for Sourcewell's Member Promotion Strategy <ul style="list-style-type: none"> • As appropriate, we would be happy to collaborate with Sourcewell's marketing and cooperative education teams to co-develop: <ul style="list-style-type: none"> o Webinars featuring successful institutional use cases o Thought leadership articles on student mental health o Sourcewell Member News articles and updates • As appropriate, our team will also be happy to participate in Sourcewell-hosted conferences and regional member meetings to present live demonstrations and answer contracting questions. 5. Performance Tracking and Reporting <ul style="list-style-type: none"> • We will track Sourcewell-sourced leads, opportunities, and closed deals via CRM reporting. • Quarterly reports will be shared with Sourcewell's member services team to inform joint strategy and measure contract adoption across education segments. <p>By embedding the Sourcewell agreement deeply into our sales infrastructure and aligning closely with Sourcewell's promotion model, we will ensure a smooth, accessible procurement experience for educational institutions—and ultimately expand access to mental health services for students nationwide.</p>
40	<p>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>	<p>Our solutions are not available through an automated e-procurement ordering system, as they require customization based on each institution's specific needs and infrastructure. Instead, schools and universities engage with us through a consultative sales process, where our Education Team works directly with institutional stakeholders to assess needs and design tailored service packages.</p> <p>To facilitate this engagement, our websites include a streamlined scheduling tool (via Calendly), allowing institutions to easily request and book an introductory meeting with our team. This ensures prospective partners receive timely, personalized guidance as they explore the best-fit solutions within the Welltrack Ecosystem.</p>

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

Line Item	Question	Response *
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<p>41</p>	<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>Welltrack by Protocall provides robust training programs to ensure seamless adoption and long-term success of our Welltrack Ecosystem of Solutions (HelpNow, Connect, and Boost). These programs are designed to equip institutional staff with the knowledge, tools, and confidence needed to integrate our services into existing workflows and campus culture.</p> <p>1. Training Scope and Availability Included as Standard: All training is included at no additional cost to Sourcewell participating entities.</p> <p>Delivered by Experts: Training is conducted by dedicated Implementation Specialists, Client Success Managers, and Clinical Education Advisors—all with deep experience in student mental health, campus systems, and care coordination.</p> <p>Customized Delivery: Training is tailored to institutional roles and service configuration. For example:</p> <p>Counseling Center staff receive clinical and platform integration training.</p> <p>Student Affairs and Orientation teams receive promotional and engagement strategy guidance.</p> <p>Health Promotion and Care Management staff are trained on utilization data, outreach integration, and follow-up workflows.</p> <p>2. Training Modalities Live Virtual Trainings (standard): Scheduled via Zoom or Microsoft Teams, these interactive sessions include guided walkthroughs of Welltrack Connect, Boost, and HelpNow services.</p> <p>On-Demand Resources: Video tutorials, PDF user guides, campus-specific quick-reference materials, and knowledge base access are provided to reinforce training content and support new staff onboarding.</p> <p>Train-the-Trainer Model: We offer train-the-trainer sessions for institutions that prefer to cascade training internally to large or distributed teams.</p> <p>Optional Refresher Trainings: Available upon request at no additional cost—for example, at the beginning of a new academic year or in conjunction with staff turnover.</p> <p>3. Timeline of Training Integration Training is a core component of our standard four-week implementation process:</p> <p>Week 1–2: Internal configuration and partner onboarding</p> <p>Week 3: Draft materials reviewed, user accounts created, staff invited</p> <p>Week 4: Live training sessions conducted prior to service launch</p> <p>Post-launch, we continue to meet with institutional partners monthly (or at a cadence they prefer) for process refinement, advanced training, and performance optimization.</p> <p>4. Supplementary Workshops and Webinars Optional student-facing workshops can be co-hosted by our team and campus staff to raise awareness and drive utilization.</p> <p>Faculty and staff orientation modules are also available upon request, especially for frontline responders or care teams outside the Counseling Center.</p> <p>Cost Summary</p> <p>All training programs and materials are provided at no additional cost to Sourcewell members who engage with Protocall through the awarded agreement.</p> <p>Optional enhancements (e.g., in-person campus trainings or expanded student wellness events) can be discussed but are not required for service use.</p> <p>Through our dedicated training model, Sourcewell members receive a fully supported onboarding and education experience—ensuring not only technical readiness but sustainable student impact and institutional alignment.</p>
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<p>42</p>	<p>Describe any technological advances that your proposed Solutions offer.</p>	<p>Welltrack HelpNow -Best-in-Class Crisis Call Center Platform: Welltrack HelpNow leverages advanced telephony systems and proprietary call management software to deliver rapid, reliable, and clinically informed support to students 24/7/365. -Advanced Reporting and Analytics Tools: Provides institutions with real-time access to call data, usage trends, and customized reports through a secure Customer Portal to support continuous quality improvement. -AI-Powered Quality Improvement: Incorporates Lyssn AI technology to analyze calls for adherence to clinical best practices, providing real-time feedback and ensuring consistently high-quality, empathetic support for students.</p> <p>Welltrack Connect -Advanced Referral Management Platform: Welltrack Connect streamlines referrals through a secure, mobile-friendly web application that allows students to search, filter, and schedule appointments with over 18,000 licensed providers across the U.S., Canada, and U.K. -Dynamic, Student-Centered Search Tools: Incorporates 13+ filters (e.g., provider identities, languages, specialties, availability) empowering students to find best-fit therapists and prescribers with ease, rather than relying on automated matching algorithms. -Real-Time Data Dashboards: Provides institutions with actionable insights through robust reporting dashboards, including referral trends, provider engagement, and student connection outcomes to inform campus mental health strategies. -Integrated Insurance Verification: Offers on-demand insurance eligibility checks within the platform, helping students understand their coverage and reducing barriers to care. -Flexible Credits System: Pioneers a pre-paid session credit model that supports both in-person and virtual care, allowing institutions to expand access to psychotherapy, psychiatry, and testing services cost-effectively, with rollover of unused credits. -Secure, HIPAA-Compliant Technology: Built on a foundation of HITRUST-certified infrastructure, ensuring data privacy, security, and seamless integration with campus systems of care.</p> <p>Welltrack Boost -Evidence-Based Digital Self-Help Platform: Welltrack Boost integrates Cognitive Behavioral Therapy (CBT), Motivational Interviewing, and Mindfulness into an interactive mobile and web application, delivering clinically proven tools directly to students' devices. -Personalized Wellness Journeys: Uses a wellness assessment to create custom plans for students, recommending video series and interactive tools (e.g., MoodCheck, Zen Room, Thought Diary) tailored to individual needs and goals. -Seamless Crisis Integration: Features a "Get Help Now" button that directly connects students in distress to 24/7 live support through Welltrack HelpNow, ensuring immediate escalation when needed. Customizable Resource Library: Allows institutions to embed campus and local resources within the app, giving students a centralized hub for wellness support and information. -Actionable Data Insights for Institutions: Provides administrators with utilization dashboards and semesterly reports, offering anonymized, aggregate data on engagement, demographics, and trends to inform mental health strategies. -Secure, Scalable Technology: Built with HIPAA-compliant and HITRUST-certified infrastructure to ensure student privacy and enable seamless adoption across diverse campus environments.</p> <p>Togetherall -Enhanced Digital Engagement: Togetherall leverages digital delivery to provide valued features such as anonymity, privacy, safety, discretion, and 24/7 availability—benefits that are difficult to replicate in offline environments. -Clinician-Moderated Peer Support Platform: Advanced technology supports real-time monitoring and moderation by licensed clinicians, ensuring a safe and supportive peer-to-peer community. -Scalable Support Through Technology: Togetherall's platform enables "people helping people" on a global scale, with technology facilitating connections and clinician oversight to maintain community integrity. -Intelligent Risk Management: Integrates advanced monitoring systems with clinical oversight to identify members in distress and seamlessly connect them to higher levels of support or crisis services when needed. -Flexible, User-Centered Design: Offers self-paced, on-demand access that empowers users with control over their mental health journey while ensuring they remain connected to professional support if necessary.</p>
<p>43</p>	<p>Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.</p>	<p>n/a</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.	n/a
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	<p>Welltrack Ecosystem Overview Welltrack HelpNow Immediate Crisis Support. Trusted. Scalable.</p> <p>Most Tenured Crisis Intervention Provider in Higher Education: Over 30 years of continuous service delivering trauma-informed, telephonic crisis support for students nationwide.</p> <p>Nationally Trusted: Serves as a designated backup center for the 988 Suicide & Crisis Lifeline, handling more than 40,000 calls per month across educational and behavioral health systems.</p> <p>Fastest Response Times in the Sector: Industry-leading average speed of answer under 20 seconds—well below national benchmarks—ensuring students receive support precisely when they need it.</p> <p>No Outsourcing: All clinicians are Protocol-employed, trained in-house, and continuously supervised to maintain the highest standards of care.</p> <p>Fully Customizable for Each Campus: Institutions receive tailored call-handling scripts, escalation protocols, and resource directories to ensure seamless integration with their local system of care.</p> <p>Barrier-Free Access: Students need only make a phone call—no app downloads, logins, or account creation required.</p> <p>Welltrack Connect Expanding Access to Long-Term Therapy. Without Limits.</p> <p>Retention-Focused Care: Designed to support students at risk of withdrawal by connecting them to specialized therapy with no limits on the number of sessions they may schedule.</p> <p>Expansive, Inclusive Network: Offers access to over 18,000 licensed clinicians across all 50 U.S. states, Canada, and the U.K.—with 45% identifying as BIPOC, 30% as LGBTQIA+, and multilingual coverage in 35+ languages.</p> <p>Student-Led Provider Search: Empowers students to choose therapists based on 13+ filters, including modality, identity, availability, and specialty—avoiding impersonal matching algorithms.</p> <p>Targeted Recruitment: Actively recruits providers in underserved specialties, languages, or regions, and invites familiar community clinicians to join the network at no cost.</p> <p>Flexible, Rollover Credit Model: Institutions purchase therapy, psychiatry, and testing credits that never expire—maximizing care capacity while minimizing unused resources.</p> <p>Insurance Compatibility: Enables students to locate in-network providers, reducing institutional financial burden when credit balances are exhausted or unavailable.</p> <p>Welltrack Boost Scalable Self-Guided Mental Health Support.</p> <p>Built for Prevention: Reduces pressure on counseling centers by helping students manage subclinical mental health issues through accessible, self-guided tools.</p> <p>Interactive Wellness Features: Includes the Zen Room (guided meditation), MoodCheck (emotional tracking), and Thought Diary (CBT-based journaling), encouraging daily engagement and self-reflection.</p> <p>Integrated Escalation Pathways: Students can access live crisis support via the “Get Help Now” button or transition directly to Welltrack Connect for ongoing therapy—ensuring a seamless continuum of care.</p> <p>Campus-Customized Resource Library: Institutions can embed their own mental health and student life resources into the platform to enhance relevance and student connection.</p> <p>Togetherall Peer Support That’s Safe, Scalable, and Clinically Moderated.</p> <p>24/7 Clinical Moderation: Every post and interaction is monitored by licensed clinicians—</p>

unlike other platforms that use lay moderators or leave discussions unmonitored—ensuring safety and responsiveness.

Proven Scale and Reliability: With 18+ years of operation and 350+ institutional partners, Togetherall provides immediate, moderated access to a thriving global community of student peers.

Anonymity Drives Inclusion: Students interact under pseudonyms, lowering the barriers to engagement for those who might be hesitant to pursue traditional therapy.

Evidence-Based Outcomes: Independent research has validated the platform's effectiveness, showing that its model delivers many of the same therapeutic elements as face-to-face mental health services.

Seamlessly Integrated with Welltrack: Fully interoperable with HelpNow, Boost, and Connect—ensuring a multi-layered support model that adapts to each student's evolving needs.

<p>46</p>	<p>Describe your screening process for pairing service providers with patients or clients for teletherapy services.</p>	<p>At Welltrack by Protocol, we prioritize clinical fit, cultural alignment, and student autonomy when pairing individuals with licensed mental health providers. Our Welltrack Connect platform is built to empower students to choose the right provider for their needs while ensuring that all clinicians meet the highest standards of licensure, safety, and accessibility.</p> <p>1. Self-Directed Provider Matching Rather than assigning therapists through impersonal and nontransparent algorithms, students are given full access to a curated directory of 18,000 licensed professionals in the US, Canada and the United Kingdom. They can search and filter by over 13 attributes, including:</p> <ul style="list-style-type: none"> - Clinical specialty (e.g., trauma, anxiety, substance use) - Therapeutic modality (e.g., CBT, EMDR, solution-focused therapy) - Provider identity (e.g., gender, race/ethnicity, languages spoken) - Availability (including evening/weekend hours) - Telehealth vs. in-person - In-network Insurance <p>This student-centered model supports better clinical outcomes by encouraging autonomy, comfort, and trust in the care relationship.</p> <p>2. Transparent, Informative Provider Profiles Every provider profile includes: Background, licensure type, and treatment philosophy, areas of clinical expertise, languages spoken and accessibility information, personal statement on cultural humility or approach to care, accepted insurance plans and payment options.</p> <p>These profiles are designed to help students make confident, well-informed decisions when selecting a therapist or prescriber.</p> <p>3. Rigorous License Verification To protect students and ensure clinical quality:</p> <p>All provider licenses are verified before the provider is approved to be active on the Welltrack Connect platform. Licenses are reviewed to confirm they are active and in good standing in each state where the provider delivers services. At the time of licensure renewal, reverification is performed for every state in which the provider holds a license. Providers must also maintain professional liability insurance and are monitored for any disciplinary actions or sanctions.</p> <p>This vetting process exceeds industry norms and ensures that institutions can trust the clinical credentials of every provider on the platform.</p> <p>4. Assisted Matching for Complex or High-Need Cases Students who prefer support in selecting a provider can receive guided assistance from:</p> <p>Campus Counseling Center staff and/or Welltrack HelpNow counselors who can facilitate custom-generated provider recommendations based on the student's criteria. Warm handoffs, clinical consultations, and therapist introductions are all available to reduce barriers and support engagement.</p> <p>5. Ongoing Quality Assurance and Feedback Welltrack Connect ensures that matching remains effective over time through:</p> <ul style="list-style-type: none"> - Optional student feedback surveys after sessions - Provider performance monitoring and student satisfaction tracking - Real-time engagement analytics to identify underutilized or high-performing matches - Students can switch providers at any time with no penalty, allowing them to find the right therapeutic fit as their needs evolve. <p>A Secure, Student-Centered Matching Experience By combining rigorous clinical credentialing with a student-led search experience and optional guidance, Welltrack Connect ensures that every student is paired with a provider who meets both their mental health needs and personal preferences. Institutions benefit from a scalable, compliant, and flexible in-person and virtual clinical model that upholds the highest standards of care.</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>Given the ubiquity of telehealth technology and the reality that many clinicians have preferred tools that align with their individual practice styles, we encourage providers within our network to use their own HIPAA-compliant teletherapy platforms. This flexibility supports provider efficiency, technological proficiency, and a smoother clinical experience—all of which translate into better care for students. All platforms must adhere to applicable federal privacy and security standards, including HIPAA and FERPA.</p> <p>What uniquely distinguishes our model is that we also welcome and encourage providers to offer in-person care, not just virtual services. This is a critical differentiator, as data shows that:</p> <p>Over 70% of students prefer in-person therapy when given the choice.</p> <p>Nearly 62% of students are not clinically appropriate for telehealth-only care due to complex needs or other exclusionary factors.</p> <p>By integrating both virtual and in-person modalities, our model supports students across the full continuum of care—from low-acuity needs that may be addressed through telehealth or digital tools, to higher-acuity cases requiring sustained, face-to-face clinical engagement. This hybrid flexibility ensures that all students can access appropriate, effective mental health support, regardless of preference, acuity, or circumstance.</p>
48	Describe how your organization maintains security of patient data and alignment to applicable legal, regulatory, or professional requirements, if any.	<p>Welltrack by Protocall maintains the highest standards for data security and compliance by aligning with all relevant federal and state regulations, including HIPAA and FERPA. Our systems and procedures are designed to ensure confidentiality, integrity, and accountability across all client interactions. Protocall has been HITRUST Certified since 2018 and we are currently undergoing recertification. We are also participating in a HITRUST/StateRAMP pilot, with StateRAMP certification expected by mid-2025; which will align us with government-level security standards rarely matched in student mental health services. Our internal policies are reinforced through annual staff training on privacy and security, and our infrastructure is continuously monitored by a dedicated Security Operations Center. We also adhere to standards set by accrediting bodies such as CARF and the American Association of Suicidology to ensure regulatory alignment and clinical excellence.</p>
49	Please describe where and how all user data, including personally identifiable information (PII) and protected health information (PHI), is stored.	<p>All user data, including PII and PHI, is stored in highly secure, U.S.-based Microsoft Azure data centers that are certified for both HITRUST and SOC 2 compliance. These data centers employ advanced encryption protocols, including AES-256 encryption for data at rest and TLS encryption for data in transit. Access to sensitive information is tightly controlled through role-based permissions and multi-factor authentication, ensuring that only authorized personnel can view or modify data. This secure infrastructure supports robust compliance with HIPAA, FERPA, and other applicable privacy regulations</p>
50	Describe licensures, degrees, and/or certifications your teletherapy professionals maintain.	<p>Welltrack Connect's provider network of 18,000 hold Masters and Doctoral level degrees and behavioral health licenses including but not limited to: LMHC, LMFT, LCSW, PhD, PsyD, PMHNP, MD.</p>

<p>51</p>	<p>Describe how you ensure service quality and continuity in cases of connectivity issues or technology failures.</p>	<p>At Welltrack by Protocall, we understand that reliable access to mental health care is essential—and that technology interruptions must not become barriers to support. To ensure service quality and continuity in the event of connectivity issues or technology failures, we implement a multi-layered approach that prioritizes responsiveness, redundancy, and student safety:</p> <ol style="list-style-type: none"> 1. Provider Technology Flexibility <ul style="list-style-type: none"> • Providers are encouraged to use their own HIPAA-compliant telehealth platforms with which they are most familiar. This promotes operational efficiency and reduces the risk of session disruption due to unfamiliar interfaces or technical limitations. • Providers are contractually required to maintain minimum technical specifications (e.g., high-speed internet, secure devices) and to have backup plans in place for connectivity loss. 2. Alternative Communication Pathways <ul style="list-style-type: none"> • In the event of a failed video session, providers are expected to immediately transition to a HIPAA-compliant phone session to continue care without delay. • If both video and phone options are unavailable, the provider or client success team will contact the student to reschedule or offer alternate options, ensuring no student is left without a path to care. 3. 24/7 Clinical Back-Up Through HelpNow <ul style="list-style-type: none"> • Students experiencing technical issues that result in missed or delayed sessions can access immediate emotional support via our 24/7 HelpNow crisis line, ensuring no disruption in care during urgent situations. • HelpNow clinicians can triage and stabilize the student, refer them to another provider if needed, and notify the institution if follow-up is required. 4. Institutional Communication and Case Tracking <ul style="list-style-type: none"> • All disruptions and rescheduled sessions are logged and visible to institutional partners via the Welltrack Connect dashboard, supporting transparency and enabling staff to follow up or intervene if needed. • Providers and students can submit issue reports through our client support portal, which are reviewed and escalated by our Client Service and Clinical Operations teams. 5. Technical and Clinical Support Infrastructure <ul style="list-style-type: none"> • Our Client Services team can provide live technical support for both providers and students during business hours and urgent assistance after hours as needed. <p>Result: Through these safeguards, we maintain high service continuity—even during unforeseen technical difficulties—while ensuring that every student receives the timely, compassionate care.</p>
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<p>52</p>	<p>What accessibility features are included to accommodate users with disabilities (e.g., closed captioning, screen readers, adaptive interfaces)?</p>	<p>Accessibility Features for Users with Disabilities</p> <p>Welltrack by Protocall is deeply committed to making the Welltrack Ecosystem accessible to all users, including those with disabilities. Accessibility is integrated throughout our design, development, and delivery processes to ensure compliance, usability, and inclusivity across Welltrack HelpNow, Boost, and Connect.</p> <p>Standards & Compliance</p> <p>Our digital platforms conform to major international accessibility standards: WCAG 2.1 Level A & AA, Section 508 of the Rehabilitation Act, EN 301 549 (EU ICT accessibility standards). These standards guide our development practices, ensuring that all users—regardless of ability—can navigate and benefit from our services.</p> <p>Assistive Technology Compatibility</p> <p>To ensure that our services are operable for users with visual, auditory, physical, or motor impairments, we test our systems using leading assistive technologies, including:</p> <ul style="list-style-type: none"> · Screen readers: JAWS, NVDA, VoiceOver · Magnification tools: ZoomText · Speech recognition: Dragon NaturallySpeaking · Keyboard-only navigation <p>Key Accessibility Features Across the Ecosystem</p> <p>Visual Accessibility: Interfaces support screen magnification, high contrast, and 200% text resizing without loss of content. Content reflows properly across screen sizes, and most interface elements are accessible via keyboard.</p> <p>Screen Reader Support: Core components and navigation structures are designed to be compatible with screen readers. Ongoing improvements are in place for full ARIA labeling and focus order.</p> <p>Closed Captioning & Transcripts: All instructional and self-help video content includes captions and transcripts. Audio descriptions are provided as needed.</p> <p>Multilingual & Communication Support: HelpNow offers real-time interpretation in over 220 languages, including support for callers using relay or TTY services. Boost is available in English, Spanish, and French, and Connect allows provider searches by over 35 spoken languages.</p> <p>Cognitive & Learning Disabilities: The Boost app and Connect platform include design features that support users with ADHD, learning disabilities, or cognitive impairments, including customizable layouts, guided navigation, and consistent UI elements.</p> <p>Continuous Improvement & Evaluation</p> <p>Third-Party Audits: Accessibility audits are conducted annually by certified experts (e.g., BarrierBreak) and documented via Voluntary Product Accessibility Templates (VPATs).</p> <p>Internal QA: We use tools such as WAVE and Lighthouse for automated checks and conduct regular manual testing using screen readers and assistive devices.</p> <p>Feedback Integration: Accessibility feedback is logged, prioritized, and integrated into our product development lifecycle, ensuring that issues are addressed promptly and updates enhance usability for all.</p> <p>By embedding accessibility into every phase of our product lifecycle, from design to delivery, Protocall ensures that all students and staff can access mental health care without barriers. Our accessibility framework not only meets regulatory standards but reflects our broader mission of equitable, inclusive behavioral health support.</p>
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<p>53</p>	<p>Do you offer multilingual support to cater to diverse populations? If so, please explain.</p>	<p>The Welltrack Ecosystem offers comprehensive multilingual support across our solutions to ensure equitable access to behavioral health services for diverse student populations.</p> <p>Welltrack HelpNow Live Interpretation in 220+ Languages: We partner with Language Services Associates (LSA) to provide real-time phone interpretation services. Interpreters are nationally certified (CCHI/NBCMI), ensuring accurate and culturally sensitive communication.</p> <p>Relay & TTY Accessibility: We support calls through State Relay (7-1-1) and offer a 24/7 TTY line (optional), allowing individuals with speech or hearing impairments to access services with confidence.</p> <p>Welltrack Connect Multilingual Provider Network: Over 33% of providers speak at least one language in addition to English. Students can filter by 35+ languages, including Spanish, Mandarin, Arabic, Vietnamese, ASL, and more.</p> <p>Welltrack Boost Boost is available in English, French, and Spanish, making mental health education and wellness tools accessible to a broad population. Translated content includes interactive tools, video series, and wellness assessments.</p> <p>Togetherall Togetherall's website primarily functions in English but also offers French for Canadian users</p>
<p>54</p>	<p>If applicable, how does your solution leverage AI to enhance your behavioral health platform and service delivery?</p>	<p>Welltrack by Protocall has partnered with Lyssn, a behavioral health AI company, on a multi-year, NIMH-funded pilot program to revolutionize how crisis care quality is assessed. Through this collaboration, we are developing AI tools that analyze recorded crisis calls—not in real time, but retrospectively—to evaluate the effectiveness of counselor responses.</p> <p>This initiative is not designed to replace human oversight but to enhance it at scale. Traditional call reviews are labor-intensive and limited to small samples. With Lyssn's technology, we can review a much broader set of interactions using consistent, evidence-based criteria. The system assesses critical counselor behaviors such as empathy, tone, adherence to protocol, rapport-building, and de-escalation strategies—offering insights that would be impossible to achieve through manual review alone.</p> <p>By integrating these analyses into our quality assurance workflow, we provide counselors with targeted, timely, and actionable feedback, supporting continuous professional development and reinforcing clinical best practices. In crisis response, where every second and every word matters, this level of feedback is transformative.</p> <p>Ethical Commitment to Privacy and Transparency We recognize the profound ethical responsibility that comes with leveraging AI in mental health. All call data used in this program is anonymized and analyzed solely for counselor performance, not client content. We have updated our privacy policies and disclosures to clearly communicate this to users and reaffirm our unwavering commitment to transparency, informed consent, and data integrity.</p> <p>Custom GPT-Based Simulation for Real-Time Training In addition to retrospective AI analysis, we have developed a proprietary GPT-powered training platform built from our extensive library of de-identified crisis call transcripts—one of the largest in the behavioral health field. This system allows counselors and trainees to:</p> <ul style="list-style-type: none"> Create custom clinical scenarios for on-demand, real-time simulation; Interact with a simulated “caller” that adapts based on counselor responses; Receive immediate feedback on clinical decision-making, risk assessment, and communication style. <p>This tool is now a foundational part of our 240-hour onboarding program and is used regularly by staff for continued skill development. It enables personalized, scalable training that mirrors the complexity and urgency of real-world crisis care—preparing our team for the nuanced challenges they face every day.</p> <p>Conclusion: Innovation with Purpose</p> <p>By responsibly integrating AI—from large-scale call analysis to dynamic simulation training—Welltrack by Protocall is setting a new standard in crisis care quality, accountability, and professional development. These tools are not just technological advancements; they are part of a broader mission to ensure that every student in distress receives empathetic, timely, and clinically sound support—delivered by a workforce that is continuously learning and improving.</p>

55	What licenses do you have and for which states?	<p>Protocall Services, Inc. (full company)</p> <p>-CARF (Commission on Accreditation of Rehabilitation Facilities) accredited.</p> <p>-AAS (American Association of Suicidology) accredited.</p> <p>Welltrack Connect (Single product)</p> <p>- Providers in the Welltrack Connect network are individually licensed as described in the answer to question 50.</p> <p>-The Welltrack Connect network covers all 50 states, Canada, and the United Kingdom (but for the sake of clarity, not every provider is licensed to practice in every state)</p>
56	Describe your AI capabilities and related security measures.	n/a

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 re-sellers 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>Payment Terms</p> <p>-Net 30</p> <p>Payment Methods</p> <p>-ACH/EFT</p> <p>-Paper check</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.	Typical transaction documents listed below, with samples attached in the document upload section. Note that we do not have standard templates, so changes may be necessary to execute any given awarded agreement. Documents -Master Services Agreement -Statements of Work -Terms of Use	*
69	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	No, we do not accept the P-card procurement and payment process.	*
70	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Protocall is offering discounted pricing for our Welltrack HelpNow, Connect, and Boost products. See "Sourcwell Pricing" file in document upload section.	*
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.	The discount we are offering depends on the product: -Welltrack HelpNow: 5% -Welltrack Connect: 10% -Welltrack Connect Flexible Credits: 5% -Welltrack Boost: 10% -Welltrack Guide: 5% -Togetherall: 0-5% (depending on length of contract) See "Sourcwell Pricing" file in document upload section for more detail.	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	Volume discounts are available based on annual spend, and are applied as credits to the following year's dues. See "Volume-Based Credit" tab of the "Sourcwell Pricing" file in document upload section for details.	*
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.	n/a	*
75	If freight, delivery, or shipping is an additional cost to the Sourcwell participating entity, describe in detail the complete freight, shipping, and delivery program.	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 Sourcwell. This process includes ensuring that Sourcwell participating entities obtain the proper pricing.	Every month, Welltrack by Protocall's Relationship Managers do an in depth review of charges, including ensuring the correct pricing for all services is listed, along with ensuring the accurate number of inbound and outbound HelpNow crisis support calls are being billed.	*
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.	In order to gauge the success of an agreement, we would track metrics such as: -Contract value -Customer retention -Student engagement	*

80	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	We propose an Administration Fee of 1%.
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Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
81	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	The pricing offered represents a discount relative to existing contracts.

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

Line Item	Question	Response *
82	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	<p>Welltrack Connect- Teletherapy and In-Person Therapy</p> <p>One-on-One Clinical Care, Delivered by a Trusted Network:</p> <p>Welltrack Connect gives students access to a robust, diverse network of 18,000+ licensed mental health professionals nationally. Our clinicians include psychotherapists and psychiatrists, with an average of 10 years of experience and specialties across a wide range of student mental health needs. Every provider meets rigorous credentialing standards, with active licensure verification and ongoing compliance monitoring.</p> <p>Students can connect with providers who reflect their lived experiences and clinical needs—ensuring high-quality, culturally competent care. With advanced filtering options, they can search by provider specialty, identity, and availability, and read detailed narrative bios. There’s no forced matching—just informed choice.</p> <p>Scheduling is designed for flexibility: most providers offer real-time calendar syncing and update availability every 30 days for easier, faster appointment access.</p> <p>Thoughtful Integration with Existing University Resources:</p> <p>Welltrack Connect doesn’t replace universities’ community partnerships—it enhances them. During onboarding, we actively recruit trusted providers already serving our new university customer’s students into our platform, preserving continuity of care while expanding options. These providers may also join our Flexible Credits network, allowing their services to be funded directly by the university.</p> <p>To further tailor support, we dedicate over 15 hours to targeted provider recruitment during implementation, focused on identifying clinicians who meet the specific needs of our new university customer’s student population. Combined with our general recruitment strategy, this two-tiered approach ensures broad access and deep specialization.</p> <p>A Multi-Tiered, Integrated Network for Ongoing and Specialized Care:</p> <p>Our network includes:</p> <ul style="list-style-type: none"> -Providers who accept Flexible Credits (university-funded sessions) -Clinicians empaneled with major and regional insurance plans -Community providers familiar with university counseling centers <p>This design empowers students to continue care beyond university-funded sessions, without disruption. Unlike fragmented telehealth platforms, Welltrack Connect offers a centralized solution that eliminates gaps, simplifies transitions, and reduces administrative overhead—maximizing both impact and efficiency.</p> <p>Built for Equity, Flexibility, and Results:</p> <p>Whether a student needs one session or a longer course of care, our university customer retains full control over how Flexible Credits are distributed. You can</p>

allocate sessions based on clinical acuity or preset a baseline per student—ensuring equitable access while preserving administrative flexibility.

This system supports:

- Both telehealth and in-person providers
- Short-term psychiatry + psychotherapy and long-term treatment
- High-acuity clinical needs such as trauma, eating disorders, or substance use
- Students benefit from full-length intakes and follow-ups, a structured care model, and tailored referrals—all supported by outcome tracking and optional satisfaction surveys.

Conclusion:

With Welltrack Connect, universities gain a flexible, clinically sound solution to meet the growing demand for behavioral health services while preserving continuity of care and student choice. Designed for adaptability, equity, and operational efficiency, Connect strengthens universities' existing mental health infrastructure—offering immediate access to licensed behavioral health professionals, tailored referral coordination, and a system that scales to meet both short-term and long-term student needs. Whether supporting students with acute behavioral health needs or those seeking ongoing care, Welltrack Connect ensures that every student has a clear, supported path to care—helping them stay engaged, balanced, and on track for success.

Welltrack Boost - Self-Guided Digital Wellness Tools

Scalable, Preventative Mental Health Support for All University Students:

When mental health support can be delivered at scale, the entire campus community benefits. Our self-help app gives universities the ability to support their entire student population—proactively and seamlessly—without overextending existing clinical resources. At its core, Welltrack Boost embodies the philosophy that an ounce of prevention is worth a pound of cure, helping students build emotional resilience, strengthen coping skills, and seek support earlier—before challenges escalate to crises.

Students can access Boost's robust library of digital wellness tools 24/7 through a mobile-friendly app or web platform, meeting them where they are and encouraging proactive engagement with their mental health.

Self-Assessments for Early Identification & Personalization:

Boost includes a suite of clinically validated self-assessments to support early detection of emotional distress, behavioral risks, and mental wellness needs. These include:

- SWEMWBS, DASS-21, GAD-7, PHQ-9
- AUDIT (for alcohol use)
- BRCS (resilience)

These assessments are research-backed, brief, and accessible on any device. Upon completion, students receive personalized recommendations for self-guided video series, coping tools, and care pathways—encouraging proactive, informed decision-making about their mental health.

Trusted, Evidence-Based Educational Content:

Students gain access to a comprehensive library of multimedia mental health resources developed by licensed clinicians and researchers. Key content includes:
-Short, digestible video series on anxiety, depression, sleep, mindfulness, resilience, and more
-Interactive exercises such as mood tracking, journaling, and guided breathing
-Tailored recommendations based on assessment results

Boost ensures that university students don't just recognize their mental health needs—they're equipped to actively manage them using tools that are evidence-based, engaging, and easy to use.

Local Resource Connection:

Boost also supports ongoing connection to local and campus-based care. Universities can customize an in-app resource library featuring services such as:

- Counseling
- Academic support
- Financial aid
- Health and wellness
- Interpersonal violence response

Following the initial wellness assessment, students are asked about areas of interest

or need. Based on responses, relevant campus and community resources are automatically embedded into their personalized support roadmap.

For students already receiving counseling, college counseling center clinicians can assign Boost content between sessions—reinforcing therapeutic goals, building skills, and freeing in-session time for deeper clinical work.

Support Across All Domains of Wellness:

Boost recognizes that mental wellness is multifaceted. The platform includes tools and content addressing:

-Physical Wellness: Series like Banish Depression to Rediscover Joy and the Activity Scheduler guide students in integrating physical activity to support mood regulation and cognitive performance.

-Emotional Intelligence: Series such as Harness the Power of Emotions and tools like the Zen Room help students build awareness, regulate emotions, and apply coping strategies in real time.

-Social Connection: Thriving with Healthy Connections and other modules strengthen students' communication skills, belonging, and peer networks—key to mental health and student retention.

Each of these dimensions contributes to student success, well-being, and persistence—making Boost a truly comprehensive solution.

Conclusion:

With Welltrack Boost, universities gain a scalable, data-informed platform to support the wellness of all students. Designed for engagement, inclusivity, and early intervention, Boost complements clinical services while meeting students' growing demand for accessible, self-directed mental health tools. From first-year students navigating college transition to upperclassmen managing academic and personal pressures, Boost provides the skills, structure, and support students need to thrive.

Welltrack HelpNow - Telephonic Crisis Intervention

We provide crisis intervention services through HelpNow, our trusted telephonic solution. We know how important it is for students in distress to feel heard, supported, and guided through their challenges. Our HelpNow counselors are here to provide that care, working in full alignment with our university customers' protocols to ensure students receive the help they need, while reducing demands on your staff.

We work with universities to build a foundation of trust and support where every student knows they have someone to turn to in their darkest hours. We help students turn even their toughest moments into opportunities for lasting growth.

Below, we explain how we fulfill each aspect of the scope of work, offering reliable, compassionate care that prioritizes student safety and well-being.

24/7 Crisis Care Access:

We understand that safeguarding students and the broader campus community is vital, especially in moments of crisis. That's why we provide direct, in-the-moment emotional and crisis support to students at any time, 24/7/365. Faculty, staff, and parents calling on behalf of students can also rely on us for immediate assistance, ensuring they have the tools and guidance needed to support the student in crisis. With over 330 trained crisis counselors supervised in real-time by Operational and Clinical Supervisors, we deliver expert care that reinforces universities' commitments to creating safe, responsive, and supportive environments.

Clinical Assessments:

Clinical assessments are central to our process, helping us ensure that every caller receives the attention they need and that the level of risk in each situation is carefully evaluated. Every clinical call includes a thorough assessment to evaluate critical factors such as:

- Risk of harm to self and/or others
- Substance use concerns
- Interpersonal relationship violence
- Psychotropic medication compliance

These assessments allow us to determine the appropriate Level of Care (LOC)—routine, urgent, or emergent—which guides our intervention strategy.

For instance, a student might call late at night feeling overwhelmed and isolated,

sharing that they've been withdrawing from friends and struggling to keep up with their classes. Our counselor conducts a detailed assessment to identify signs of depression and substance use concerns. Based on the evaluation, we provide coping strategies to help the student through the immediate crisis, connect them with local and campus mental health resources, and, if needed, coordinate further intervention or emergency services. Our LOC framework ensures that every intervention is tailored to the student's unique situation, offering support from de-escalation to long-term care coordination.

Expert Clinical Team:

In moments of crisis, you need assurance that the people answering the calls are experts in crisis support—trained professionals who provide unwavering support when it matters most. At Protocall, we set the gold standard in the industry by ensuring that every counselor is thoroughly trained in-house, delivering consistent, high-quality care without outsourcing any aspect of training or service delivery.

Our team consists of over 330 crisis counselors, a mix of master's-level and bachelor's-level staff, all equipped to handle calls from start to finish. They provide empathy, build rapport, conduct clinical assessments, and deliver tailored interventions to meet the unique needs of each caller. While the nationwide shortage of master's-level mental health clinicians has been well documented, Protocall took a forward-thinking approach in 2021, integrating bachelor's-level employees into our operations to ensure long-term sustainability. This model, aligned with SAMHSA's best-practice guidelines for Behavioral Health Crisis Care (2020), allows us to maintain the quality of service our clients expect while addressing workforce challenges.

Since implementing this model, outcome data demonstrates that bachelor's-level staff deliver the same exceptional results as their master's-level counterparts, with no measurable difference in the quality or effectiveness of their interventions. In fact, over 96% of calls are resolved without escalation to higher levels of care—a testament to the effectiveness of our model. For universities, this means their students receive expert support, day or night, from a team built to handle crises with skill, empathy, and precision.

Clinical Supervision:

In a crisis, there's no room for uncertainty—you want experts at every level providing the best possible support. Our counseling team is overseen by experienced Clinical and Operational Supervisors available to provide guidance, oversight, and support to counselors during any call.

Our Operational Supervisors focus on ensuring call responsiveness and operational efficiency. They monitor real-time call volume and adjust staffing as needed to maintain prompt service. Using tools such as shift modifications, break coordination, and targeted alerts to mobilize additional counselors, they ensure every call is answered quickly and professionally, even during surges in volume.

Meanwhile, our Licensed Clinical Supervisors provide immediate consultation and procedural guidance to counselors during calls. They monitor calls on both a random and as-needed basis, offering real-time feedback and support to ensure adherence to SAMHSA's Core Elements for Responding to Mental Health Crises. This includes person-centered interventions, shared responsibility, strengths-based approaches, and recovery-oriented language. Clinical Supervisors also conduct documentation reviews to confirm compliance with Protocall's high standards.

This real-time support and oversight allow counselors to respond effectively to even the most complex situations. For instance, a counselor might receive a call from a student worried about their roommate making threatening statements about harming others. While gathering critical details and providing reassurance, the counselor works closely with a Clinical Supervisor to escalate the situation to campus security and local law enforcement. This ensures the safety of everyone involved while providing the student with guidance and stability throughout the process.

For universities, this means every call is supported by not just one, but a team of professionals working together to safeguard your students. Our layered system of oversight ensures compassionate, expert intervention and operational excellence at every step.

Comprehensive Crisis Management:

In a crisis, you need a partner who can manage every aspect of the situation from start to finish, including the most severe scenarios, such as arranging for law enforcement to transport students to the hospital when necessary. A partial solution that handles only certain situations leaves gaps, burdens your staff, and fails to fully support your students. When lives are at stake, every step must be handled with

precision to ensure the safest outcomes.

We specialize in managing crises comprehensively, effectively handling even the most high-stakes situations. Depending on the nature of the call, our process may include the following key elements:

- Initial crisis assessment
- De-escalation interventions
- Safety planning
- Coordination with campus resources
- Mobilization of emergency services when required
- Police department coordination for hospital transport
- Follow-up care recommendations

In a situation where a student is in an acute crisis and cannot guarantee their own safety, our counselor steps in to guide the process from start to finish. This may include keeping the student calm while arranging for law enforcement to provide transportation to a hospital, ensuring all parties are informed and aligned to deliver the safest outcome. Our team approaches these high-stakes moments with exceptional competence, professionalism, and empathy, reducing the strain on your staff while prioritizing the student's safety and well-being.

We resolve the vast majority of calls without escalation, highlighting our commitment to effective, minimally invasive interventions. However, when emergency services are required, we act immediately to safeguard students and protect lives.

When our counselors encounter critical impasses, such as Duty to Warn situations or imminent abuse or neglect, we have procedures to coordinate with Student Counseling Services immediately. We can also customize notification criteria to ensure your team is aware of specific urgent situations, like hospital transports or emergency services dispatch.

This comprehensive approach delivers the highest level of care to your students while alleviating the burden on your staff. With HelpNow, you can trust that your campus community is supported by a partner who prioritizes safety, professionalism, and expert crisis resolution at every step.

Scalability and Emergency Support:

HelpNow is your trusted partner during campus-wide emergencies or times of increased demand. With a team of over 330 crisis counselors, we are prepared to handle increased call volumes while maintaining responsive, high-quality support.

In these critical moments, a Relationship Manager collaborates closely with the university customer to coordinate resources and anticipate additional support needs. Depending on the nature of the emergency—whether a natural disaster, public health crisis, or other urgent situation—we can quickly connect students to relevant local resources, such as nearby emergency shelters and food distribution sites. This ensures students receive both immediate emotional support and practical assistance during challenging times.

Our flexible, collaborative approach helps your campus stay steady and supported when it matters most.

Proven Results:

At Protocall, our commitment to clinical excellence extends beyond promises—it's reflected in measurable outcomes and trusted accreditations. Our company is accredited by the American Association of Suicidology (AAS) and the Commission on Accreditation of Rehabilitation Facilities (CARF), affirming that we meet the highest standards in crisis intervention and behavioral health care.

To ensure our HelpNow service continues to meet the needs of individuals in crisis, we've implemented an evidence-based post-call outcome survey. Sent via text message immediately after a call (where clinically appropriate), the survey gathers direct feedback on key aspects of the caller's experience, empowering us to refine our approach and maintain alignment with their needs.

The results reveal the real-world impact of our work:

- Respondents who found interactions helpful: 95%
- Respondents who felt counselors demonstrated understanding and empathy: 94%
- Respondents who agreed on actionable plans for next steps or safety: 92%
- Respondents who felt more hopeful after interacting with the team: 66%
- Likelihood of future outreach (average score on a 7-point scale): 6.05/7

These results speak to the strength of our HelpNow service, consistently delivering

compassionate, effective support. For students, this translates to meaningful care and positive outcomes at every step, ensuring they feel heard, supported, and empowered.

Conclusion:

HelpNow delivers peace of mind for students, staff, and families, ensuring no one faces a crisis alone. By handling every aspect of crisis management, we:

- Reduce the burden on Student Counseling Services staff.
- Provide reassurance to students, faculty, and families that expert support is always available
- Enhance resilience and well-being, contributing to a safer, healthier academic environment.

We are proud to serve as a trusted partner to universities, delivering the expert support necessary to address crises and protect student success and safety.

Welltrack Guide - Navigation Add-On for the Welltrack Ecosystem

Direction For The Next Mental Health Step:

Knowing where to start or what to do next is difficult. Many students don't take the next step in care because they don't know what it is. Guide directs students to the Welltrack solution in our Ecosystem that best suits their exact needs. A seamless bridge between Boost's self-guided tools, Togetherall's peer-based community, HelpNow's immediate responsiveness, and Connect's ongoing clinical care, Guide ensures that no student loses their way on their mental health journey, providing clear paths forward at every turn.

Togetherall - Clinically Moderated Peer Support

Founded in 2007, Togetherall was an early innovator in using digital tools to support mental health. Stigma about mental health issues was widespread and they saw the world needed a safe judgement free space for people to share feelings and support each other with issues such as stress, depression, anxiety, and coping with the pressures of life. Over a decade later Togetherall is a valued, vibrant, helpful, and welcoming digital peer-to-peer mental health support community working with a diverse population of over four million students across 350+ colleges and universities in the United States, Canada and the United Kingdom.

Togetherall drives impact by complementing the wider service system at a population level. Online peer support can provide the right level of help in a particular moment of need. Peer support can be effective as students' needs vary, and that is why Togetherall is used by institutions of higher education to complement promotion, prevention, early intervention, treatment, and recovery-oriented strategies.

The attributes of Togetherall's community allow institutions to harness advantages valued by users, including anonymity, privacy, safety, and discretion, along with clinical moderation by professionals, flexibility, self-reliance, and 24/7 accessibility. Students can access the community as needed, as often as they need to. In a recent analysis of the past 100,000 students using the peer support community, 92% indicated that they were not seeking formal support through campus-based services. Over 50% of students engaging in the community are sharing something for the first time indicating that the peer support community provides a safe and unthreatening avenue for students seeking help.

Institutions choose Togetherall in part due to their clinical structure, which is instrumental to the safety of the community. They are the only digital peer support community monitored and moderated 24/7 solely by a large multi-disciplinary clinical team of accredited mental health professionals including social workers, counselors, and psychologists. All clinical staff are Togetherall employees and assume an ethical mandate to care for and safeguard our members consistent with the universal ethical principles that guide licensure/registration of mental health disciplines. As such, their clinical team is not simply reacting but is charged with proactively safeguarding with sustained effort over time until our duty is fully discharged.

Known as Wall Guides within the community, the licensed clinicians foster a culture where students feel able to share their lived experiences while receiving and providing support. This structure maintains and continually improves a system of effective risk management for the minority of students who may experience a crisis while using the service.

Clinical review, moderation, and intervention activities include the following:

- New members are reviewed for potential risk (at registration) and proactively contacted if needed;

		<p>-All members who contribute new content will interact with a clinical staff member; -All content generated by members is reviewed; -Signposting – clinicians provide customized local resources to members in need based on their unique situation; -Risk intervention – each institution and Togetherall will carefully define and agree upon risk pathways in the event of an internal de-escalation with a member or an external escalation off the platform. -Clinical capacity is continuously adjusted to guarantee timely responses and effective clinical interventions for those in need; -Clinical staff are available to members at the click of a button.</p> <p>These unique practices and features ensure that Togetherall's clinically moderated peer-to-peer community is:</p> <p>-Safe for everyone with risk mitigation for those in crisis; -Vibrant and active; -Healthy and therapeutic for all kinds of concerns and topics; -Proactively and continuously cleansed of problematic behavior (unsupportive, disruptive, harmful, discriminatory, bullying, trolling, etc.) -Increasing awareness of and connection to other appropriate services offered by the institution.</p>
83	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>c. 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;</p>

Table 78: Depth and Breadth of Offered Solutions

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

Line Item	Category or Type	Offered *	Comments
84	Category 1: General Public Entity Employees and Citizens, if yes answer 85-88	<input type="radio"/> Yes <input checked="" type="radio"/> No	n/a
85	Psychology, Social work, or Special Education Services	<input type="radio"/> Yes <input checked="" type="radio"/> No	
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	n/a
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	Yes, for secondary and higher education institutions, for adults and children aged 13+.
95	Psychology, Social work, or Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes
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	Yes
97	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes
98	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes
99	Speech	<input type="radio"/> Yes <input checked="" type="radio"/> No	No
100	Occupational Therapy	<input type="radio"/> Yes <input checked="" type="radio"/> No	No

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](#) - Welltrack by Protocol Pricing_Sourcewell.xlsx - Tuesday July 22, 2025 08:05:13
 - [Financial Strength and Stability](#) - 2024 Final Financial Statements.pdf - Monday July 21, 2025 11:08:03
 - [Marketing Plan/Samples](#) - Welltrack Marketing Asset Samples.pdf - Tuesday July 15, 2025 09:45:11
 - WMBE/MBE/SBE or Related Certificates (optional)
 - [Standard Transaction Document Samples](#) - Master Services Agreement, Statement of Work, Terms of Use.pdf - Monday July 14, 2025 16:24:46
 - Requested Exceptions (optional)
 - Upload Additional Document (optional)

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

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

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

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Aarti Khullar, Vice President, Education Solutions, Protocall Services, Inc.

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