



**MASTER AGREEMENT #072225**

**CATEGORY: 1 and 3 – Virtual Behavioral Health Therapy and Related Services**

**SUPPLIER: TELUS Health (US) Ltd.**

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 TELUS Health (US) Ltd., 250 Royall Street, Suite 210W, Canton, MA 02021 (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 as of the Effective Date.

Sourcewell and Supplier have in place a separate Contract dated January 27, 2022 (the "2022 Contract"), awarded under a separate solicitation process (Solicitation Number: RFP #102821). While the 2022 Contract remains active until its expiration date for Participating Entities under such agreement, the parties agree that as of the Effective Date of this Agreement, Supplier shall no longer sell its services under the 2022 Contract, and instead this Agreement shall apply to all new transactions with Participating Entities as of the Effective Date.

**Article 1:  
General Terms**

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

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access

Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.

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

- 7) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 8) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 9) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 10) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 11) **Open Market.** Supplier's open market pricing process is included within its Proposal.

**12) Supplier Representations:**

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
  - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
  - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 13) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
  - 14) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcwell if this certification changes at any time during the term of this Agreement.
  - 15) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal

grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to “federal” should be interpreted to mean the United States federal government. The following list applies to the extent that each provision is relevant and applicable, 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 Sourcwell 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 Sourcwell for this Agreement and must provide prompt notice to Sourcwell if that person is changed. The Authorized Representative will be responsible for:
- Maintenance and management of this Agreement;
  - Timely response to all Sourcwell and Participating Entity inquiries; and
  - Participation in reviews with Sourcwell.

Sourcwell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcwell 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 Sourcwell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcwell 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;
- Sourcwell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcwell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

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

- Participating Entity Contact Name;
  - Participating Entity Contact Email Address;
  - Participating Entity Contact Telephone Number;
- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.
- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. In the event of failure to remit payment, delinquent payments, underpayments, or other deviations from the payment requirements of this Agreement, Sourcewell shall provide written notice to the Supplier specifying the nature of the payment deficiency. The Supplier shall have forty-five (45) days from receipt of such notice to remedy the payment deficiency and bring the account current. Failure to cure the payment deficiency within the forty-five (45) day remedy period 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. Notwithstanding the foregoing, Supplier may assign (including an assignment by operation of law), transfer or delegate any of its rights or obligations to any of its affiliates or any successor in interest to all or substantially all of the assets or business of any Supplier line of business, without Sourcewell's consent but upon written notice to Sourcewell, in which case, such affiliate or successor in interest shall be bound by and entitled to the benefit of the terms, conditions and obligations of this Agreement. 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 a Party 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.
  - a) **Indemnification and Limitation of Liability.** Subject to subsection 17(b) below, Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any third-party claims or causes of action, including reasonable attorneys' fees incurred by Sourcewell, arising out of any negligent 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.
  - b) Supplier's total aggregate cumulative liability (including liability of Supplier's affiliates and subcontractors) to Sourcewell and its affiliates (collectively, "Aggrieved Parties"), for all claims, demands, actions, causes of action, lawsuits, judgments, damages, costs, expenses, or losses of any kind (collectively, "Claims") arising out of or relating to this Agreement—whether based on contract, statute, tort (including negligence), or any other legal theory—shall be limited to the Aggrieved Parties' actual, direct damages and shall not exceed \$250,000 USD in the aggregate for all Claims, except as provided below.

For Claims arising from the following carve-outs, Supplier's aggregate liability shall not exceed the amounts as set out in each carve-out below:

1. Supplier's indemnification obligations under this Agreement, for which the Supplier's aggregate liability shall not exceed \$1,000,000 USD;
2. Claims resulting from Supplier's gross negligence, willful misconduct, or fraud, for which the Supplier's aggregate liability shall not exceed \$2,000,000 USD;
3. Bodily injury or death caused by Supplier, for which the Supplier's aggregate liability shall not exceed \$2,000,000 USD.

For the purposes of carve-out #2 above, gross negligence means any act or failure to act by any person that was in reckless disregard of the harmful consequences such person knew, or should

have known, such act or failure to act would have on individuals or property, but does not include any act or failure to act that constitutes mere ordinary negligence.

- c) Except as expressly provided above, this remedy shall be the Aggrieved Parties' sole and exclusive financial remedy against Supplier, any Supplier affiliates and contractors. In no event shall Supplier have any liability at any time for any loss of profits, loss of business revenue, failure to realize expected savings, or for any indirect, special, or consequential damages, even if advised of the possibility of such damages.

17) **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.

18) **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. All use of Supplier's trademarks by Sourcewell shall be in compliance with Supplier's brand guidelines. Sourcewell shall not modify the trademarks or use them in any manner that may damages Supplier's reputation or goodwill. All use by Sourcewell of Supplier's trademarks shall cease upon the expiration or termination of this Agreement.

- b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party, upon written consent from the other 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.

19) **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.

20) **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.

21) **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, or the equivalent, 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 insuring against claims for bodily injury, including death, and property damage, including loss of use, and personal injury including advertising liability, arising out of Supplier's operations under this Agreement. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, 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. Following the renewal 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 include 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. Where

permissible by law, the commercial general liability insurers will provide primary coverage to Sourcewell in respect of liability arising out of Supplier's operations under this Agreement and will not seek contribution from other insurance available.

- d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) its commercial general liability insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement. 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.
- 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.

22) **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.

23) **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**

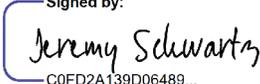
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, 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 and/or Supplier may require the use of their own respective forms to complete transactions directly between such parties 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

TELUS Health (US) Ltd

Signed by:  
  
C0FD2A139D06489...  
By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer

Date: 2/10/2026 | 6:35 AM CST  
\_\_\_\_\_

Signed by:  
  
0D936F1EFC6043B...  
By: \_\_\_\_\_  
Christy McGuire  
Title: U.S. Head of National Sales & Strategic Growth Initiatives

Date: 2/10/2026 | 6:20 AM CST  
\_\_\_\_\_

# RFP #072225 - Virtual Behavioral Health Therapy and Related Services

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## Vendor Details

Company Name: LifeWorks (US) Ltd.  
Does your company conduct business under any other name? If yes, please state: TELUS Health  
Address: 250 Royall Street  
Suite 210W  
Canton, Massachusetts 02021  
Contact: Colleen Hunter  
Email: colleen.hunter@telushealth.com  
Phone: 716-406-7866  
Fax: 339-502-4001  
HST#: 52-1883918

## Submission Details

Created On: Wednesday July 02, 2025 11:43:35  
Submitted On: Tuesday July 22, 2025 14:04:03  
Submitted By: Colleen Hunter  
Email: colleen.hunter@telushealth.com  
Transaction #: 93714948-2b5b-421a-b897-ec39b0482192  
Submitter's IP Address: 147.243.208.202

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**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.	TELUS Health (US) Ltd.
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).	TELUS Health (US) Ltd. is responsible for the delivery of the proposed services.
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE: 7KXU7; UEI: YW8VC98K22K3
5	Provide your NAICS code applicable to Solutions proposed.	541612; 624190
6	Proposer Physical Address:	250 Royall Street, Suite 210W, Canton, MA 02021
7	Proposer website address (or addresses):	www.telushealth.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):	Christine Mcguire, Head of Sales, US E: christine.mcguire@telushealth.com T: +1 9802159982
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Colleen Hunter, Director, Student Support Programs E: colleen.hunter@telushealth.com T: 716.406.7866
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	Colleen Hunter, Director, Student Support Programs E: colleen.hunter@telushealth.com T: 716.406.7866

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

Line Item	Question	Response *
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<p>11</p>	<p>Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.</p>	<p>Our firm's origins trace back to 1966 and have delivered EAP mental health solutions since 1974. TELUS Health has a long history of partnership, and the development and delivery of mental health and wellness solutions for public sector clients. Our focus is providing world-class solutions to our clients to support the mental, physical, social and financial wellbeing of their people.</p> <p>TELUS Health continues to grow, strengthening our service offering and the depth and reach of support we can provide to our clients. In May 2025 we acquired Workplace Options (WPO), a leading global organization that delivers counseling and wellbeing services to 88 million employees across 200 countries and territories. This means that our partners and clients will have support and expertise from an even larger, more comprehensive clinical network worldwide, and employees and students will have intake access to master's level clinicians through WPO's in-the-moment support model, expanded referral networks to more counselors, support providers, and care navigators. WPO's their suite of technology and operational service components will soon be leveraged for all TELUS Health and WPO clients globally, thus increasing the value we offer our partners. This is something we anticipate sharing more about as operations and product mapping of our combined programs continues.</p> <p><b>Student Support Services</b>          TELUS Health Student Support launched in 2015 with tele/chat/video support for students, considering cultural sensitivities, language, location, and clinical licensing. With the company's global network, we could easily support these students and provide important insights to campus leaders. Shortly thereafter, TELUS Health Student Support extended support to other special populations traditionally underserved or unable to be served by campus counseling centers e.g., study abroad, continuing education, online learning programs, regional campuses. In continuing innovation and responding to the interests and needs of our student users and institutional partners, TELUS Health Student Support Community launched in 2022, adding online multilingual peer-to-peer support services to round out our global student support program. Virtual Psychiatry was also launched in 2022 as a pilot and officially launched in 2023 as an optional service along TELUS Health Student Support. 2023 and 2024 brought updates to data and reporting, and 2025 will offer new access points, more student content, and user experience enhancements in addition to expanded virtual psychiatry services.</p> <p><b>EAP services</b>          TELUS Health EAP services first launched in 1974. As a global health and wellbeing provider encompassing physical, mental and financial health, our philosophy is to ensure the right support for everyone—anytime, anywhere and in the way they need it. Through our global-leading technology and passionate team members we aim to be the most trusted wellbeing company in the world. We believe that by considering all of the needs of the employee holistically—the financial, social, physical, and mental wellbeing of the individual—each can be addressed more effectively. We are experienced at understanding how compromised health can affect an employee's performance at work, potentially creating issues such as absence or disability leaves. Being an EAP provider is about more than simply delivering a service. It is about being a trusted partner: providing insight, best practices and thought leadership to the client, ensuring they are prepared for the opportunities and challenges that lay ahead. The first goal of our EAP is prevention, while the second is early intervention. We achieve both through health and wellness promotion in the workplace, as well as effective resolution-focused counseling. Our counselors receive rigorous ongoing training to deliver a consistently high-level of quality. Our EAP can also be fully integrated into any return-to-work process and disability management strategy. Our goal is to operate with total accessibility and inclusivity, and our research-based solutions ensure multiple access points for your employees.</p>
<p>12</p>	<p>What are your company's expectations in the event of an award?</p>	<p>If awarded the contract, TELUS Health will be thrilled to continue our trusted partnership with Sourcewell and its partners. We view our client relationships as true partnerships. Our approach ensures that our resources are your resources, providing regular access to our top thinkers and subject matter experts across areas such as mental health strategy, disability management, digital innovation, program evaluation, and data analytics. We offer access to best practices, trends, and data sets, and collaborate closely with your team to track both macro and micro healthcare trends. Our commitment is to deliver a comprehensive, client-focused solution, leveraging our expertise and resources to support your organizational goals.</p>

13	<p>Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.</p>	<p>TELUS Health has retained profits in every year since its inception. TELUS Health has been in business for over 56 years (including the LifeWorks legacy), and our parent company's public status and global operations further demonstrate our financial stability and long-term commitment to the market. Our corporate clients often cite this stability as one of the primary factors in their decision to have us deliver services of such high importance to their employees and family members.</p> <p>TELUS Health is a global healthcare leader with more than 11,304 employees and collaboration with over 60,000+ client organizations worldwide, we are committed to delivering employee wellbeing, benefits administration, retirement, and wellness products and services with an unmatched level of customer service excellence.. For more information please refer to TELUS Corporation's Consolidated Financial Statements and Annual Report, which are available at <a href="http://www.telus.com">www.telus.com</a>, SEDAR, or EDGAR.</p>	*
14	<p>What is your US market share for the Solutions that you are proposing?</p>	<p>TELUS Health is a significant player in the US market, offering comprehensive Student Support Solutions and EAP services. Global share is about 15%. Our global SSP/EAP solutions market was valued at approximately \$5,000 million in 2024 and is projected to grow to \$8,200 million by 2031.</p>	*
15	<p>What is your Canadian market share for the Solutions that you are proposing?</p>	<p>TELUS Health owns about 90 per cent of the EAP/SSP market share in Canada and 15% internationally. As a global EAP provider, delivering both digital innovation and clinical services to improve total wellbeing, we have established our reputation through expertise in a number of specific areas, such as: mental health and addictions support; total health and wellness solutions; innovative technology; training, seminars and orientations; and traumatic event support.</p>	*
16	<p>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>	<p>N/A TELUS Health is a financially stable organization.</p>	*
17	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). 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?</p>	<p>TELUS Health is the service provider of the proposed solutions.</p>	*
18	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>We are accredited and certified by the Council on Accreditation (COA), which is the only EAP/SSP industry-specific accreditation available anywhere in the world. Additionally, TELUS Health was approved and awarded the Knox Keene license to provide non-exempt EAP services in California (USA). At the clinical level, all users, students, employees, or family members who book ongoing appointment-based counseling will connect with an experienced provider licensed to practice independently in their jurisdiction. Our recruiting and staffing team maintains records of licensure and good standing statuses for all clinicians across our global provider network</p>	*
19	<p>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 Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.</p>	<p>N/A</p>	*

20	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>TELUS Health has received numerous industry awards and recognitions in the last five years, including:</p> <ul style="list-style-type: none"> <li>• 2025: TELUS Health was recognized as a Top Vendor in Wellness for Q1 2025 by Shortlister.</li> <li>• 2024: Included in the Corporate Knights 2024 Global 100 Most Sustainable Corporations in the World; recognized in the Corporate Knights Best 50 Corporate Citizens in Canada; recognized by Mediacorp Canada Inc. as one of Canada's Greenest Employers; recognized by TIME Magazine and Statista in their inaugural list of the World's Most Sustainable Companies, ranking 21st globally and as the most sustainable telecommunications company in Canada.</li> <li>• 2022: Awarded the Sustainability Excellence Award at the World Sustainability Awards; recognized at the Global Good Awards as Global Good Company of the Year (bronze); named to the Dow Jones Sustainability North America Index for the 24th consecutive year; recognized as one of Canada's Greenest Employers; recognized by NelsonHall as an overall leader for next-generation benefits administration;</li> <li>• 2022 Microsoft Canada Impact Awards: TELUS Health, formerly LifeWorks, won the ISV Impact Award from the Microsoft Canada Impact Awards.</li> <li>• 2021 Awards of Excellence: TELUS Health, formerly LifeWorks won a silver award for its Mental Health Index in the category of Best Use of Media Relations Large Budget.</li> <li>• 2021 CPRS Ace Awards: TELUS Health, formerly LifeWorks, won two gold awards for its Mental Health Index in the categories of Best Use of Media Relations-Large Budget and Best Use of Media Relations-COVID-related.</li> <li>• 2021 Annual Spring Digital Health Awards: TELUS Health, formerly LifeWorks, won silver for its COVID-19 Toolkit; bronze for its New Normal in the Pandemic Toolkit; bronze for its Building Awareness of a Diverse, Equitable, and Inclusive Workplace eLearning program; and a merit award for its Wellbeing Wednesdays on Facebook Live.</li> <li>• 2019: TELUS Health (formerly LifeWorks) was recognized by the Canadian HR Reporter Readers' Choice Awards in the categories: benefits and pensions consultants, disability management consultants, EAP (employee assistance program) providers, and mental health services providers.</li> </ul>
21	What percentage of your sales are to the governmental sector in the past three years?	<p>We have a long history of partnership, and the development and delivery of mental health and wellness solutions for many government institutions in the United States and Canada. Our client base of more than 500 consists of well-recognized government institutions. We are licensed to operate and deliver counseling services in all States and US territories and across Canada, ensuring compliance with all relevant Federal and State/Provincial privacy regulations and laws, and meeting or exceeding all audited confidentiality and privacy requirements as established by the Employee Assistance Society of North America (EASNA) and the Council on Accreditation (COA).</p>
22	What percentage of your sales are to the education sector in the past three years?	<p>We have extensive experience working with educational institutions across US and Canada, and globally. TELUS Health Student Support Solutions support over 2 million students across more than 1,000 colleges and universities across North America. Additionally, TELUS Health EAP currently supports approximately 500 educational clients across US and Canada with mental health and wellbeing solutions.</p> <p>We support some institutions with partial populations and others have full campus access to counseling and wellbeing services providing EAP services to universities, colleges, and school districts, among other organizations. We have also supported these clients with services such as investment policy review, investment strategy development, asset allocation analysis, manager search, performance monitoring, and asset-liability studies. Our experience includes managing pension and endowment funds, conducting risk assessments, and providing recommendations to optimize investment structures for educational sector clients.</p>
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?	<p>TELUS Health has Student Support contracts with several state institutions that have piggybacked on one another's contracts. Our specific cooperative purchasing agreements are limited to our current Sourcewell contract, which is open to any members, private nonprofits or public educational institutions, that have a need for student mental health support services. TELUS Health has also contracted with the Commonwealth of Massachusetts, Operational Services Division, however that is limited to US-based public institutions of higher education and doesn't allow for nonprofit private institutions as Sourcewell does. Sales volume for each of these agreements has fluctuated over the years as new members opted in and others opted out. In the last 2.5 years of the Sourcewell agreement, 4 contracts have utilized Sourcewell, including one state system with 12 colleges, 2 additional universities, and one school system. Five MA-based institutions utilized the Commonwealth of Massachusetts contract for TELUS Health services.</p>

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?	N/A
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**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 Illinois at Urbana-Champaign ("Illinois")	Carla J. McCowan, Ph.D. Counseling Center Director and Licensed Clinical Psychologist Office of the Vice Chancellor for Student Affairs cmccowan@illinois.edu	217-333-3704
University of Northern Iowa	Jennifer Jass, DNP, ARNP Director, Psychiatric and Counseling Services jennifer.jass@uni.edu	319-273-2009
Atlanta Public Schools	Phaedra Brown, LPC, CPCS Employee Wellbeing- Program Director Office of Total Rewards & Workforce Planning phaedra.brown@apsk12.org	404 802 2368

**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.	TELUS Health employs a direct sales force working directly for the organization. TELUS Health sales team members are empowered to work with clients to design and negotiate the best product and service suite possible to meet their needs and goals.
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	TELUS Health' Solutions will be delivered by TELUS Health counselors and wellbeing professionals.
28	Service force.	TELUS Health employs the largest number of master's level clinicians in North America. These counselors are trained to support the diverse needs of employees and students through multiple clinical delivery channels (telephone, chat, video, in-person). TELUS Health's national clinical network consists of 40K counselors across nearly 170 countries, including 25K counselors in the US alone. This makes it easy to support users whenever and wherever in the world they're located.
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	Sourcwell members that are interested in ordering TELUS Health EAP or Student Support services should reach out to TELUS Health through the point of contact listed on the Sourcwell's TELUS Health contract page, or through your Sourcwell representative. You'll be asked to provide the name or your institution/organization, your lead point of contact, how many users (students/employees) you'll have using the service, as well as a few more service preferences and details. From there, we'll work on contracting together.

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.	Our customer service is designed to provide immediate, live, and accessible support 24/7/365 through multiple modalities, including toll-free phone, chat, SMS/text, video, and digital platforms. We employ a professional network of master's-level clinicians and customer success/account management professionals to ensure high-quality service delivery. Our care access centers are staffed with over 525 professionals, including more than 100 master's-level client care counselors in the U.S., who support callers live and immediately. Dedicated account management is provided by customer success managers who offer proactive support, thought leadership, and are accountable for the overall success of the EAP. We also offer a professional, project-managed program transition/re-launch, led by a dedicated implementation manager, and provide access to print-on-demand and interactive online communication and promotional materials. Our approach emphasizes confidentiality, accessibility, and responsiveness to ensure employees and their families receive the support they need efficiently and effectively.	*
31	Describe your ability and willingness to provide your products and services to Sourcwell participating entities.	TELUS Health would be honored to continue our partnership with Sourcwell to support your participating entities. We are committed to providing our products and services to clients with a focus on delivering value that extends beyond execution. Our approach is to act as true client partner, prioritizing the economic and operational advantage of our clients at all times. We offer a comprehensive range of health and wellness solutions, and are equipped to deliver these services virtually, and at client locations. Our network spans urban, rural, and remote areas, ensuring accessibility and high-quality care regardless of location. We are willing and able to tailor our offerings to meet the unique needs of each client, leveraging our national and international presence and diverse clinical expertise to deliver innovative and effective solutions.	*
32	Describe your ability and willingness to provide your products and services to Sourcwell participating entities in Canada.	TELUS Health is a global provider of Student Support and EAP solutions. We are able and willing to provide services across all Canadian provinces and territories. In fact, we have the most extensive counseling network of any Canadian provider and can service all rural and remote locations, in addition to indigenous-specific support to First Nations, Inuit, and Métis people.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	TELUS Health will deliver THSS and EAP in states, all provinces and territories across the US and Canada. There are no limitations.	*
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.	Any participating entity of Sourcwell will have access to our EAP solutions for employees and their families to take advantage of; however, our Student Support program is currently only available for high school and college-aged students. Because of limitations with age of consent, this will vary by state.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	No restrictions or specific requirements beyond what's outlined in our response to #34.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes, we can.	*

**Table 4: Marketing Plan (100 Points)**

Line Item	Question	Response *	
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>Your TELUS Health team will provide marketing and communication templates, ready-to-share promotional assets, along with support from a dedicated client success manager for optimal engagement and utilization. We'll work with each Sourcwell participating entity to identify what needs they uniquely have, create collateral to be shared, advise on best practices, and support their teams. We have included samples of Student Support and EAP materials in attachment.</p> <p>TELUS Health strives for high Student Support and EAP engagement with every partner we work with. We do this by working closely with each participating entity to develop and execute a strategic integration and communication plan. On a high level, valuable insights into Sourcwell's participating entities' program will be provided through regular reporting (Engagement Reports) on call center metrics, student /employee demographic data, success measures, clinical service level data, as well as digital engagement metrics (app downloads, articles read, videos watched, etc.) and Community peer support. This comprehensive outcomes-based engagement reporting constitutes a de-identified aggregate on all utilization from the participating entity. This will be prepared monthly and on demand by your dedicated client success manager to help inform other programs and services offered by the institution.</p>	*

38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>We leverage our digital platform, TELUS Health One, to enhance EAP marketing effectiveness through several technology-driven features. The platform includes a Wellbeing Newsfeed that allows designated administrators of the participating entities to communicate directly with employees via push messaging, email notifications, and mobile push notifications. These communications can promote wellbeing education, raise awareness, and drive utilization of benefits by linking to in-depth content and related support services. Our platform also tracks participant interaction with features and functions, providing real-time analytics and insights reporting. This includes data points such as adoption and registration information, overall engagement, activities by month, participation in wellbeing activities, and resource utilization. These metrics enable us to measure the effectiveness of our communication and marketing campaigns, refine strategies, and target support where it is most needed.</p> <p>Additionally, the platform personalizes content and communications using a machine learning engine, serving users relevant content, goals, and notifications at optimal times to maximize engagement. Social elements such as Social Streams and Community Groups further promote engagement and allow for the distribution of program content and updates. We do not use external social media platforms for direct marketing to students or employees. Instead, all digital engagement and data collection occur within our secure, branded platform environments.</p> <p>The THSS app can be configured to each Sourcewell participating entity's institutional branding to create a connection to campus. It includes self-directed digital health and wellbeing content, evidence-based health assessments, and virtual fitness sessions. In every corner, the services are tracking utilization trends, directing students to engage with other elements of support options available.</p> <p>In addition, brochures, flyers, posters, monthly social media and email campaign copy, we actively use technology to strengthen our service delivery, encourage engagement and utilization, identify trends, and improve data collection. Once students /employees have the respective app downloaded to their device, they'll frequently receive push notifications as friendly reminders they have access to THSS/TELUS Health EAP app support to encourage utilization of clinical mental health support among other support and referral services.</p>
39	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>Sourcewell's role in promoting any agreement arising out of this RFP is to publicly post the RFP documents, award information, contract and pricing files so that members can locate it. Sourcewell reps should champion this contract when connecting with student and people organizations that express a need for it. Sharing this contract at relevant conferences is helpful to. Likewise, Sourcewell's ability to support TELUS Health is promoting this agreement is valuable too. During our current contract, our Sourcewell reps have volunteered to provide educational 1:1s with our prospects. They've consulted with members interested in our services and introduced us. They've provided promotional tools and informational assets we share at conferences and events. We value the brainstorming sessions and positive mindsets our Sourcewell reps always bring to the table to encourage more engagement with their members and utilization of the agreement.</p> <p>To integrate a customer-awarded agreement into our sales process, we transition knowledge across the Student Support and EAP sales teams, to the client relationship leads, implementation team, and ongoing client services team. The salesperson ensures that contractual provisions, statement of work, and pricing are accurately reflected in the final contracts. During implementation, the salesperson works with the project team to ensure client expectations are met and the solution aligns with the agreement. The salesperson may attend kick-off and project charter meetings. For ongoing service, the salesperson remains in contact with the client services team to communicate knowledge of the service agreement and scope, and collaborates with both the client and service teams to resolve any challenges in meeting the scope of work.</p>
40	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	<p>TELUS Health's wellbeing and mental health services are sensitive in nature, so terms of use must be negotiated and agreed upon before any services can be delivered. That said, we can absolutely accommodate e-procurement POs for add-on and renewal services. For new services, however, depending on what service is being requested, additional contracting may be required to agree on additional, applicable terms. If a government or educational customer uses an e-procurement site exclusively for invoices and payments, we can accommodate this without issue.</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>Training for each client is mandatory for key stakeholders and encouraged beyond that. For Student Support, we offer training for faculty/staff in addition to student orientations which serve as most critical to effectively market to and educate students/employees. The same goes for EAP clients. Key stakeholders must be trained, and beyond that, best practices show more training results in higher engagement and better utilization. Prior to training, your dedicated CSM will collect the participating entity's goals and priorities for THSS and EAP and however you may choose for it to integrate with other services. It's ideal when a circle of care is created to complement and supplement on-campus or office onsite services and resources. This information will be woven into the trainings so students, faculty, and staff know exactly how THSS or EAP, respectively, fits into the participating entity's suite of mental health support services. Both of these are offered at the in advance of and just following service launch. Orientations and program training are offered at no fee.</p> <p>Refreshers can be offered throughout the year as requested.</p> <p>Additionally, TELUS Health offers one-hour awareness seminars virtually, allowing for unlimited attendees. These trainings provided by TELUS Health Learning trainers can be used as the participating entity wishes – tailored per audience to support students, faculty and staff/employees and leadership initiatives to develop the skills groups need to help drive behavior change, achieve individual and institutional goals, and foster a culture of health and wellbeing.</p> <p>Additional details are available here: <a href="https://learning.telushealth.com/format/awareness-seminar/">https://learning.telushealth.com/format/awareness-seminar/</a>.</p>
<p>42</p>	<p>Describe any technological advances that your proposed Solutions offer.</p>	<p>We offer several technological advances within our proposed solutions:</p> <ul style="list-style-type: none"> <li>• We invest 10 percent of annual revenue into developing new technologies and approaches to data analytics, resulting in numerous EAP industry firsts, such as multi-modal access (Web, iOS, Android, Microsoft TEAMS app), SSO, and self-guided CareNow modules. Our platform, TELUS Health One, is natively available in 60+ languages, with curated, culturally relevant content and support for right-to-left languages. We have also introduced online and telephonic CBT therapy, and a comprehensive online mental health screening and diagnostic program (InfluenceCare). For Student Support, we were the first student mental health clinical support app to launch for students in 2015, and we're still the only program to offer 24/7 multilingual chat support and virtual fitness for students. We were the first to integrate student-level data with campus electronic health record systems and we continue to innovate data reporting. We also added the only exclusively student, global peer support program, which allows students to connect and engage with other students anytime in +30 languages. Our digital innovation includes online service booking, self-directed support, logical integration points across products, embedded AI for better health outcomes, global chat capabilities, a real-time Strategy Portal for engagement/utilization data, and API-driven architecture for integration with client solutions. Student Support will soon offer more just-in-time access points for students, and we're currently working on an improved user experience with new modalities for accessing support.</li> <li>• Our system technology for enrollment is a year-round engagement platform, providing a benefits hub that supports complex rules, offers decision support tools, and educates employees throughout the year, making the process user-friendly and comprehensive.</li> <li>• We are implementing a web-based platform for absence reporting, moving away from phone-based systems, and enhancing our case management workflows with artificial intelligence to support early intervention and digital health recovery tools.</li> <li>• Our future roadmap includes advanced data analytics, AI-powered health assessments, dynamic eligibility, expanded localization, global API availability, and tailored solutions for diverse healthcare systems worldwide.</li> </ul>

<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>We have implemented a comprehensive range of green initiatives across our organization and solutions. These include:</p> <ul style="list-style-type: none"> <li>• Environmental stewardship through formal policies focused on understanding and minimizing the environmental impacts of our activities and operations, including proactive steps to protect the environment, waste management, and energy and water conservation programs.</li> <li>• Waste management and minimization strategies, such as reducing, reusing, and recycling waste, eliminating single-use plastics, and promoting a paperless environment through digital solutions and default double-sided printing.</li> <li>• Employee engagement via Green Committees/Green Teams, training sessions, and regular communications to raise environmental awareness and encourage sustainable practices at work and at home.</li> <li>• Sustainable procurement programs, including a Supplier Code of Conduct and a Sustainable Paper and Packaging Policy, with a minimum scoring weight for environmental and social responsibility in all sourcing events. We also promote responsible procurement by working with suppliers who share our commitment to sustainability and by conducting supplier due diligence and ESG audits.</li> <li>• Energy efficiency initiatives, such as 'Lights Out' policies, use of eco-friendly cleaning products, and optimization of printer inventory to reduce energy and paper consumption.</li> <li>• Conservation programs, including tree planting (over eight million trees in 2024, totaling 19 million over 25 years), and investment in clean-tech startups through the TELUS Pollinator Fund for Good.</li> <li>• Recognition and awards for sustainability, including:             <ul style="list-style-type: none"> <li>o ISO 14001:2015 certification for our Environmental Management System (certifying agency: International Organization for Standardization)</li> <li>o Sustainability Excellence Award at the World Sustainability Awards 2022</li> <li>o Bronze at the Global Good Awards 2022</li> <li>o Named to the Dow Jones Sustainability North America Index (certifying agency: S&amp;P Dow Jones Indices)</li> <li>o Corporate Knights 2024 Global 100 Most Sustainable Corporations in the World</li> <li>o Industry Top-Rated ESG Performer by Sustainalytics</li> <li>o Recognized as one of Canada’s Greenest Employers by Mediacorp Canada Inc.</li> </ul> </li> </ul>
<p>44</p>	<p>Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.</p>	<p>Given the nature of our business, the environmental impact of our product and services is not significant. Nonetheless, we understand the need to be a leader and serve as an example to our clients and employees by engaging in formal environmental stewardship and developing an environmental policy that involves:</p> <ul style="list-style-type: none"> <li>• Understanding the environmental impacts of our activities and operations and taking proactive steps to protect the environment and minimize our impact</li> <li>• Obeying all applicable environmental regulatory requirements in the jurisdictions where we have a presence</li> <li>• Advancing and promoting the responsible and efficient consumption of energy and water through conservation programs both in and outside of the workplace</li> <li>• Implementing waste management and minimization strategies and programs to reduce, re-use and recycle the waste we generate</li> <li>• Increasing employees’ environmental awareness through stewardship and conservation programs</li> <li>• Engaging with our key stakeholders to help ensure that broader perspectives on environmental priorities and shared resources are identified and considered in our business activities</li> <li>• Promoting the responsible use of business travel to manage and minimize our carbon footprint through the utilization of virtual meeting tools and technologies</li> <li>• Developing and adopting a sustainable procurement program and supporting standards to apply across our supply chain</li> <li>• Measuring and reporting our environmental performance through our corporate social responsibility program</li> </ul> <p>TELUS was awarded the Sustainability Excellence Award at the World Sustainability Awards 2022 for its global leadership and commitment to building a better, more sustainable future. Held in Munich, judges recognized TELUS for its ambitious sustainability strategy, environmental business practices and rapid progress on diversity and inclusion. TELUS was also recognized at the Global Good Awards 2022 in London, placing bronze as Global Good Company of the Year. Both of these award ceremonies recognize individuals, organizations, and businesses around the world who are driving positive social and environmental change. TELUS’ recognition at the World Sustainability and Global Good Awards follows a number of international accolades recognizing TELUS’ global leadership in sustainability, corporate citizenship, social purpose, and environmental and social reporting, including:</p> <ul style="list-style-type: none"> <li>• DJSI: Named to the Dow Jones Sustainability North America Index for the 24th consecutive year.</li> <li>• In June 2024, we were recognized by TIME Magazine and Statista in their inaugural list of the World’s Most Sustainable Companies, ranking 21st out of 500 companies globally. TELUS was ranked as the most sustainable telecommunications company in Canada and the second most sustainable Canadian company overall, recognizing our global leadership in corporate citizenship and philanthropy, innovation management, and environmental and social impact reporting for more than two decades.</li> <li>• In January 2024, we were included in the Corporate Knights 2024 Global 100 Most Sustainable Corporations in the World; this was the 12th time we have been included since inception of the recognition in 2005. We were also recognized in the Corporate Knights Best</li> </ul>

50 Corporate Citizens in Canada.

- Industry Top-Rated ESG Performer by Sustainalytics.
- In April 2024, we were recognized by Mediacorp Canada Inc. as one of Canada's Greenest Employers.

The Global Opportunity in Health Care

We believe that technology can help deliver even better and more sustainable health and wellness experiences for our clients and our team members. TELUS Health is a global leader in delivering technology-enabled solutions that help clients support the total wellbeing of their people and build organizational resiliency. We are a leader in innovation and provide the greatest choice in clinically validated support delivery options. We continually strive to remove potential service access barriers, offering everything our clients want for the care their people need and in the ways they want to receive it , including digital, chat, video, telephonic.

As an organization TELUS is helping to reduce our collective carbon footprint by investing in our networks, innovative technologies and sustainable business practices. TELUS was recognized as one Canada's Greenest Employers in 2022 and 2023.

The company's 2024 Sustainability Report outlines our environmental, social, and governance strategy and priorities. It includes the ambitious goal to use 100 percent renewable or low-emitting energy by 2025 and highlights how we embed sustainable business practices into our operations, which, since 2010, has resulted in:

- 59% from renewable or low-emitting sources
- 10% reduction in operational (Scope 1 & 2) GHG emissions since 2023
- 58% reduction in energy intensity

Some of our other environmental initiatives:

- In 2024, we planted over eight million trees in Canada, supporting restoration across more than 5,300 hectares of terrestrial ecosystems and bringing TELUS' total cumulative tree planting contributions to 19 million trees over the last 25 years.
- With an initial \$100-million commitment, TELUS Pollinator Fund for Good supports purpose-driven companies with environmental and social solutions to scale up operations and put their ideas into practice. TELUS has recently increased the fund's portfolio to 30 companies, announcing investments in clean-tech startups like Flash Forest and Dryad Networks, which use cutting-edge technology to prevent and mitigate the effects of wildfires.
- Completing the external required audits to certify our EMS to the updated ISO 14001:2015 standard.

<p>45</p>	<p>What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?</p>	<p>TELUS Health offers several unique attributes that distinguish our company, products, and services in the industry:</p> <ul style="list-style-type: none"> <li>• We are a global leader serving people in more than 180 countries, delivering digital innovation and clinical services across the full spectrum of primary and preventative care. Our approach to EAP services integrates employee and family assistance, health and wellness, recognition, pension and benefits administration, retirement consulting, actuarial and investment services. Our Student Support approach integrates mental health, physical wellbeing, social and financial wellness, and academic resources to ensure student success.</li> <li>• Our solutions are backed by clinical excellence and thought leadership, with a robust research agenda, evidence-based integrated solutions, and a dedicated enterprise research team. We regularly consult with academic researchers, practitioners, and clients to ensure our services meet current and emerging needs.</li> <li>• We manage the largest clinical network in the world, with a presence in over 180 countries and approximately 65,000 global health professionals providing services in 250 languages and dialects. This infrastructure allows us to support diverse and complex workforces and provide rapid support during times of crisis.</li> <li>• Innovation is a core driver for us. We have introduced industry-firsts such as TELUS Health CBT (a mobile, multi-modality cognitive behavioral therapy platform), Ava (an AI-enabled Automated Virtual Assistant), and InfluenceCare (a comprehensive online mental health screening and diagnostic program). Our technology platform is highly configurable, modular, and flexible, supporting complex rules and offering a variety of decision support options.</li> <li>• Our EAP platform operates on a proprietary machine learning engine, personalizing the user experience for higher engagement. We offer real-time health risk assessments with predictive modelling and integration with wearable devices.</li> <li>• We provide Wellbeing Engagement Specialists as part of our program fees to assist in all aspects of program creation and delivery, and our platform and programming are highly configurable to blend with each client's unique culture.</li> <li>• Our flexibility in design allows us to customize programs to integrate with clients' global wellness strategies and branding, while retaining local cultural applicability. We work closely with clients and their other health and wellness vendors to ensure seamless integration.</li> <li>• We have a strong presence across the US and Canada, and a deep understanding of both countries' standards and best practices. Our executive leadership and business strategy are focused on key areas of growth in the US and Canada, and we are committed to employing local talent.</li> <li>• Our commitment to thought leadership is demonstrated through regular publication of research, reports, and white papers, as well as expert advice to governments and public sector organizations. We have received numerous awards for innovation and service excellence.</li> <li>• We offer a comprehensive, human-centric, and holistic wellbeing strategy, addressing the needs of healthy individuals proactively and those in crisis or higher acuity care. Our solutions are designed to meet people wherever they are on their mental health and wellbeing journey.</li> </ul>
<p>46</p>	<p>Describe your screening process for pairing service providers with patients or clients for teletherapy services.</p>	<p>Our screening process for pairing service providers with patients or clients for teletherapy services is supported by our proprietary internal case management platform, Symphoni. Intake personnel use a set criteria of information-gathering protocols, including screening for crisis or immediate health needs, demographic questions for detailed reporting, high-level clinical assessment for triage, and recommendations for next steps. The platform utilizes a detailed algorithm and rules engine to match clients with clinicians based on expertise, improving the client/counsellor connection and overall outcomes. Advanced provider search capabilities include specializations, experience, provider ratings, geolocation, wheelchair and public transit accessibility, language, and assurance that clients from the same organization are not scheduled in back-to-back appointments. Our hiring practices enable matching based on religion, gender, orientation, ethnicity, veteran status, culture, and language preferences, among other criteria. Sensitivity to spiritual, cultural, language, and other issues is assessed during recruitment, which includes face-to-face interviews, role-playing, and reference checks. If a specific request falls outside our current network, we have recruiting and staffing processes to serve clients accordingly, or may address needs through alternative modalities such as telephonic, video, or in-person sessions.</p>

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>We offer multiple methods of delivery for teletherapy services to ensure accessibility, flexibility, and privacy for users. Our primary modalities include:</p> <ul style="list-style-type: none"> <li>• Telephonic counseling: Real-time support is also available via telephone, providing another secure and immediate option for users.</li> <li>• Online chat (First Chat): Users can access confidential, real-time support through an online chat consultation service available 24/7/365. This modality is particularly suitable for those who prefer written communication or require additional privacy.</li> <li>• Secure video counseling: Scheduled therapeutic sessions are conducted via a secure video connection, allowing both the client and counselor to see and hear each other in real time. The system is secure and includes a telephonic link to ensure continuity in case of internet disruption.</li> <li>• Web portal: Our TELUS Health One platform enables users to book appointments, access digital self-help programs, and connect with counsellors via chat or video. The platform is accessible from any device, at any time.</li> <li>• In person: scheduled counseling appointments may be available for a person to meet with a counselor in their office. The person must transport themselves to the counselor's office to meet face-to-face.</li> <li>• All care is provided synchronously, ensuring real-time interaction between the user and the clinician, whether via chat, video, telephone, or in person.</li> </ul>
48	Describe how your organization maintains security of patient data and alignment to applicable legal, regulatory, or professional requirements, if any.	<p>TELUS Health maintains the security of patient data and ensures alignment with applicable legal, regulatory, and professional requirements through a comprehensive and adaptive security framework. Our approach is anchored by ISO/IEC 27001:2022 certification and is overseen by our Data &amp; Trust Office in collaboration with our Global Privacy &amp; AI Compliance team. We adhere to major international regulations, including GDPR, HIPAA, PHIPA, and PCI DSS, and accommodate jurisdiction-specific requirements across our operational territories. Our security measures include robust data handling and classification systems, advanced anonymization and pseudonymization protocols, and stringent controls for cross-border data operations. We maintain complete data traceability, document international data transfer agreements, and strictly adhere to data residency requirements. Continuous monitoring, regular compliance reviews, security audits, and ongoing policy updates ensure our alignment with evolving standards.</p> <p>We have implemented a comprehensive written Information Security Program aligned with industry standards such as NIST 800-53 Rev. 5, ISO/IEC 27001, ISO/IEC 27002, and Trust Services Principles. Security controls include encryption of data at rest and in transit, web application firewalls, SIEM monitored 24/7 by a third-party SOC, incident management, data loss prevention, and role-based access control. All employees, subcontractors, and third parties are required to sign confidentiality or non-disclosure agreements, which are regularly reviewed for compliance with business needs and legislation.</p> <p>At the organizational level, we meet or exceed all audited confidentiality and privacy requirements established by the Employee Assistance Society of North America (EASNA) and the Council on Accreditation (COA). Our privacy and confidentiality protocols are regularly reviewed by a designated privacy officer and committee to ensure ongoing compliance with new requirements. Service providers are contractually bound to our confidentiality standards, which often exceed local legal requirements. Information is shared only with employee consent or as required by law.</p> <p>Our formal, documented confidentiality and privacy policy outlines the collection, use, and disclosure of personal information, and describes safeguards, accuracy, access, and processes for privacy concerns. Risk assessments are conducted annually and rolled into a corporate report for executive and board review.</p> <p>We also comply with professional clinical requirements for data retention and destruction, as confirmed by COA audits. Our commitment to security and compliance ensures that patient data is protected throughout its lifecycle and in accordance with all applicable legal, regulatory, and professional standards.</p>
49	Please describe where and how all user data, including personally identifiable information (PII) and protected health information (PHI), is stored.	<p>All data, including personally identifiable information (PII) and protected health information (PHI), is stored on servers located in the United States and Canada, respective to the location the user's account is associated with. TELUS Health provides all data hosting, IT support, and core service delivery elements internally and does not use subcontractors. Data is protected through a combination of physical, administrative, and technological safeguards, including role-based access controls, encryption for data in transit over public or untrusted networks, and physical security mechanisms such as card reader access, access logs, and video monitoring at data facilities. Additionally, TELUS Health securely disposes of and destroys media, equipment, and hard drives to further protect user data.</p>

50	Describe licensures, degrees, and/or certifications your teletherapy professionals maintain.	<p>Our teletherapy professionals maintain the following licensures, degrees, and certifications:</p> <ul style="list-style-type: none"> <li>• All counseling professionals possess either a master's or doctorate in psychology, clinical social work, educational psychology, or a related mental health field.</li> <li>• Counselors are required to have a minimum of three years post-master level clinical experience in Canada and five years in the US, and at least 2,500 hours of professional counselling experience.</li> <li>• Proof of degree and liability insurance is mandatory.</li> <li>• All counsellors must hold membership in good standing with a professional accredited association within their field and are bound by the code of ethics, complaint investigation process, and disciplinary sanctions of their respective colleges or associations.</li> <li>• Trauma counselors must have a minimum master's degree in a mental health-related field and specialized training with an accredited and recognized organization in trauma support. Many also hold advanced training certifications from the International Critical Incident Stress Foundation (ICISF).</li> <li>• For teletherapy, counselors are screened and assessed for their skills in tele-counseling and online modalities, and they participate in ongoing training and supervision specific to these service modalities.</li> <li>• We conduct annual license checks to ensure all clinical team members maintain their professional registration in good standing with their regulatory body and meet all state and provincial licensing requirements where teletherapy is practiced.</li> </ul>
51	Describe how you ensure service quality and continuity in cases of connectivity issues or technology failures.	<p>We ensure service quality and continuity in cases of connectivity issues or technology failures through several mechanisms:</p> <ul style="list-style-type: none"> <li>• We maintain a 99% uptime reliability for our case management software, which includes scheduled downtime. During any planned or unplanned outages, a full business continuity process is employed. All users are redirected to our 24/7 call centers, where details are recorded using offline forms and communicated to the organization. Once the system is back online, these details are entered, and official notifications are sent. This business continuity plan is jointly agreed upon with the organization during implementation and is actively maintained throughout the contract lifecycle.</li> <li>• Our business continuity plan includes operational processes and policies to ensure that appropriate resources, staffing, and procedures are in place so assistance is always available. Service centers are set up with complete redundancy, including sophisticated phone switches and procedures to divert telecommunications traffic if needed. Clinical and work/life staff are cross-trained to answer calls from anywhere, ensuring uninterrupted support.</li> <li>• For hosted environments, our production support team is responsible for incident ownership, monitoring, tracking, and communication. Data, server, and site recovery capabilities are in place, with storage replicated across primary and secondary regions. In the event of a system recovery, we follow a protocol for logging, tracking, and managing the situation, including escalation and client notification as required. Restoration and recovery are managed by the production support team or subject matter experts, and incidents are closed upon resolution.</li> <li>• When it comes to clinical cases, each clinical care representative and all counselors must have a wired ethernet connection to ensure satisfactory internet speeds to handle chat and video support. If there were power outages, the phone is always available as a backup.</li> </ul>
52	What accessibility features are included to accommodate users with disabilities (e.g., closed captioning, screen readers, adaptive interfaces)?	<p>We include a range of accessibility features to accommodate users with disabilities. TELUS Health One is compliant with WCAG 2.1 AA and ADA standards across iOS, Android, and Web platforms. Features include support for screen readers, image descriptions for the visually impaired, closed captioning for the hearing impaired, and access to content using a keyboard for those with mobility restrictions. Our web portal is tested using both automated tools and manual methods, including screen readers. Communication and promotional materials are available in multiple accessible formats such as HTML, Word, PDF, open captioning, sign language, described video, Braille, real-time captioning, assistive listening devices, and large print. We have an alternative format request process to address specific user requirements. Our service centers offer TTD/TTY lines and support 711 Relay Services for hearing-impaired users. The Accessibility Center of Excellence ensures accessibility standards are applied throughout the product development lifecycle, and developers receive ongoing training. Regular assessments and audits are conducted to maintain compliance, and user-reported accessibility issues are addressed through a documented process with timely updates to clients.</p>

53	Do you offer multilingual support to cater to diverse populations? If so, please explain.	<p>Yes. We offer extensive multilingual support to cater to diverse populations. Our global student support and EAP services are available in more than 180 countries and delivered in over 150 languages. We maintain a global clinical network of approximately 40,000 clinicians and provide service access modalities including video, chat, virtual group counseling, online support, a mobile-first app, as well as in-person and telephonic.</p> <p>Our clinical call centers across North America have staff clinicians who can directly service students and employees in a wide range of languages, including but not limited to Afrikaans, French, Mandarin, American Sign Language, German, Marathi, Arabic, Gujarati, Polish, Bosnian, Hebrew, Portuguese, Cantonese, Hindi, Punjabi, Croatian, Italian, Romanian, Dutch, Konkani, Russian, Filipino, and Malayalam. Additionally, callers can communicate in their choice of over 250 languages and dialects through advanced translation services provided by LanguageLine Solutions, which offers direct interpretation by qualified professionals.</p> <p>In the U.S., we provide EAP support in English and Spanish as part of our standard service team model, with access to LanguageLine services for additional languages. In Canada, we offer fully bilingual EAP service delivery in English and French, with direct access to native French and English-speaking coaches. Our online portal and IVR system accommodate Spanish, French, and English, and we have bi-lingual case managers for Spanish-speaking employees. For other languages, a language interpretation line is available.</p> <p>The Student Support program is available 24/7/365 in five languages – English, Spanish, French, Mandarin and Cantonese, or Simplified Chinese for chats.</p> <p>We also support the hearing impaired through dedicated TTD/TTY lines and 711 relay services, and our web portal is compliant with accessibility standards, including WCAG 2.1 and Section 508. We also have counselors ready to provide support in American Sign Language over video calls or in person.</p>
54	If applicable, how does your solution leverage AI to enhance your behavioral health platform and service delivery?	<p>Our solution leverages AI to enhance our behavioral health platform and service delivery in several key ways:</p> <ul style="list-style-type: none"> <li>• We utilize AI to help users who may not know what service to access or how to articulate their needs. AI qualifies the context of a user's statement (e.g., "I am struggling") and suggests appropriate options, such as self-help CBT-based care plans, connecting with a counselor, or arranging a legal consult.</li> <li>• In 2024, we launched a provider-facing AI in Canada, enabling providers to access information and answer EAP user questions efficiently without manual searches. Further deployments are underway in other countries.</li> <li>• AI is used to personalize the platform experience, tailoring available options and content based on member interactions to improve engagement and outcomes.</li> <li>• The TELUS Health Community platforms use AI to scan all text that's input by users. The algorithm will flag comments and posts, journal entries, and group and private messages. It will identify trending themes, supporting clinical monitoring and escalation of crisis situations by clinicians 24/7/365.</li> <li>• We are developing a Care Access Center Assist chatbot to help customer care representatives in the US and Canada respond to member queries more effectively.</li> <li>• AI features within TELUS Health One help categorize and moderate user-generated content, supporting a safe and supportive environment.</li> <li>• Our AI and Machine Learning (ML) technologies are designed with a strong focus on bias mitigation, including rigorous analysis of training data, ongoing monitoring of algorithmic outcomes, and diverse representation in testing and validation. We employ technical approaches such as algorithmic adjustments, data augmentation, and retraining with diverse datasets to ensure fairness and accuracy.</li> <li>• We follow responsible AI frameworks and have achieved certifications such as Privacy by Design (ISO 31700-1) for our GenAI Customer Support Tool, underscoring our commitment to privacy, ethics, and transparency.</li> <li>• Our global and diverse team ensures that AI development is informed by multiple perspectives, and we engage with diverse communities to continuously improve inclusivity and reduce structural bias.</li> </ul>
55	What licenses do you have and for which states?	<p>TELUS Health is licensed and compliant with laws and regulations to deliver services in all 50 states. In the state of California, we hold the Knox Keene license to provide non-exempt EAP and Student Support services in California. With this license, we are not restricted to the number of sessions we can offer customers in California, allowing for clinically appropriate support when it makes sense.</p>

<p>56</p>	<p>Describe your AI capabilities and related security measures.</p>	<p>We leverage artificial intelligence (AI) and machine learning (ML) technologies across our solutions to deliver innovative, personalized, and efficient experiences for users. Our AI capabilities include:</p> <ul style="list-style-type: none"> <li>• Provider-facing AI tools to assist providers in accessing information and responding to user questions efficiently.</li> <li>• AI-driven personalization of user experiences, tailoring options and recommendations based on member interactions.</li> <li>• AI moderation and flagging within the TELUS Health Community platform, with 24/7/365 clinical monitoring and escalation protocols for crisis situations.</li> <li>• Development of AI-powered chatbots to assist Care Access Center representatives in responding to member queries.</li> <li>• AI features within TELUS Health One to categorize and moderate user-generated content.</li> </ul> <p>To mitigate risks and ensure responsible AI use, we implement the following security and ethical measures:</p> <ul style="list-style-type: none"> <li>• Adherence to a responsible AI framework, ensuring ethical, fair, transparent, and accountable AI development and deployment.</li> <li>• Regular monitoring of AI algorithms for bias, with proactive detection and mitigation strategies, including diverse and global team involvement in development and validation.</li> <li>• Data privacy and security measures, including robust encryption, access controls, secure data storage, anonymization, and pseudonymization.</li> <li>• Compliance with data privacy regulations and industry standards, including Privacy by Design (ISO 31700-1) certification for certain AI tools.</li> <li>• Privacy impact assessments and regular audits to evaluate and address privacy risks.</li> <li>• Obtaining member consent for data collection and processing for AI purposes, with clear communication on data use.</li> <li>• Human oversight in AI processes, ensuring explainability, transparency, and the ability to intervene when necessary.</li> <li>• Continuous monitoring, evaluation, and risk assessment of AI systems to ensure performance, accuracy, and compliance with regulations.</li> <li>• Engagement with diverse communities and multi-disciplinary experts to inform responsible AI development and prevent structural bias.</li> </ul>
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**Table 5B: Value-Added Attributes**

Line Item	Question	Certification	Offered	Comment
57	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or resellers if available. Select all that apply.		<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
58		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
59		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
60		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
61		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
62		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
63		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
64		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.
65		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	TELUS Health is not a MBE, WBE, SBE, DOBE, VBE, SDVOB, SBE, SDB, or WOSB.

**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>TELUS Health offers unique pricing for EAP services and Student Support services, allowing organizations to choose the right program or combination of services. EAP's services are offered as a per employee per month (PEPM) rate, where as Student Support is priced annually, so there is a price per student per year (PSPY). Additional fees may need to be considered, depending on whether clients use our API to push data into their EMR, or want to take advantage of access to new program entry points.</p> <p>Our standard payment terms are 30 days from the invoice date. Collection efforts typically commence if the invoice ages 45 days from the invoice date. We forward invoices to customers approximately one week before the period covered by the invoice, with payment normally due within 30 days. Options for payment frequency include monthly, quarterly, semi-annually, and annually.</p> <p>Accepted payment methods include cheque (monthly, quarterly, or annual basis), pre-authorized debit, recurring credit card payment, ACH (preferred), one-time credit card, and Electronic Fund Transfer (EFT). The invoicing and payment schedule will be agreed upon at contract award. Alternative billing methods include the transmission of invoices through email in .pdf format.</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.	Should TELUS Health be awarded a new contract with Sourcewell, we anticipate using the following standard transaction documents:  For TELUS Health Student Support Standard Agreement Terms and Conditions, including an order form Student-level Terms of Use Student-level Description of Services Student-level Informed Consent agreement (optional) For TELUS Health One EAP Services Wellbeing Platform Services Agreement Template USA Fixed PEPM (no PPR) 3 year including an order form Statement of Understanding Each of these documents is subject to change, open to negotiation, and confidential between TELUS Health and our individual clients and their members. Samples can be provided in advance of any Sourcewell Participating Entity's interest in contracting, in connection with an awarded agreement with Sourcewell.	*
69	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	Yes, we accept P-cards/charge cards at no additional cost.	*
70	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	TELUS Health EAP services are typically priced out with a per employee per month (PEPM) rate and there are different session models available depending on an organization's preferences. There are also add-on services available, like a block of training hours, charged at a flat rate, or a bank of critical incident support offered as an hourly fee for service (FFS).  TELUS Health Student Support services are typically priced at a per student per year (PSPY) rate, and add-on services are also available. Beyond the add-on services above, virtual psychiatry is available for student populations, offered as a FFS, but rates are variable based on the services needed and time of contracting	*
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.	TELUS Health is honoring its Student Support pricing table from our original contract, less any annual increases. Since the original agreement was 2022, less three years of CPI increases, there's approximately a 12% savings.	*
72	Describe any quantity or volume discounts or rebate programs that you offer.	Our Student Support pricing scales as populations increase.	*
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.	The Student Support program offers an API that pushes student-level data directly into the institution's electronic health/medical records system. With a few EHR/EMRs, we simply collect the setup and maintenance cost from our clients and send along the at cost fees to the EMR/EHR vendors.	*
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.	Virtual psychiatry care is an additional fee for services. This must be addressed between the institution and TELUS Health at the time of purchase, as the rates are subject to change based on the time the institution is contracting.	*
75	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	N/A	*
76	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	N/A	*
77	Describe any unique distribution and/or delivery methods or options offered in your proposal.	N/A	*
78	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	Our sales and CSM teams will be trained on Sourcewell and how to represent your organization .	*
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.	Count of how many Sourcewell members have inquired about services.	*

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.	TELUS Health is proposing a 3% Administrative Fee. That's 3% of the initial ACV on new, original contracts.	*
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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.	TELUS Health offers competitive pricing.

**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.	Please see the included attachment outlining TELUS Health EAP services and TELUS Health Student Support services.
83	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	TELUS Health offers solutions in all of the categories listed in the RFP. We have included a detailed description of these solutions in our response top q.82 above.

**Table 7B: Depth and Breadth of Offered Solutions**

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

Line Item	Category or Type	Offered *	Comments
84	Category 1: General Public Entity Employees and Citizens, if yes answer 85-88	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health EAP services are available for this population, and contracts must be initiated through an organization and TELUS Health to begin providing services.
85	Psychology, Social work, or Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Students and/or employees can call or chat in to connect with a counselor or community resource team member
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 checked="" type="radio"/> Yes <input type="radio"/> No	Students and/or employees can call or chat in to connect with a counselor or community resource team member
87	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health EAP and Student Support services are available 24/7/365 and high-risk crisis support is provided in an attempt to de-escalate the user or connect the appropriate first responders with them accordingly
88	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health counselors assess users' mental health presenting issues and support them with coping skills and resources to help them improve their mental health over time. Virtual psychiatry services are available for diagnostic evaluations and medication management, but students must be referred in by a campus staff member. The latter is not a services student users can opt-in for, like 24/7 EAP or Student Support services.

89	Category 2: Public Safety Employees, if yes answer 90-93	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health EAP services are available for all types of organizations including Public Safety. Employees can seek support through the EAP, 24/7/365. TELUS Health Student Support connects with campus Public Safety employees in certain situations when students need on-campus support while TELUS Health counselors are addressing high risk situations. This is done in partnership of our organizations to keep students and others on campus safe and well.	*
90	Psychology or Social work	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health clinicians can support users that call or chat in through various counseling methods. All of the providers have a background in psychology, social work, or related master's degree.	
91	Behavioral, Emotional, or Mental Health Counseling including but not limited to: video sessions, phone or text sessions, self-guided or self-help programs	<input checked="" type="radio"/> Yes <input type="radio"/> No	Students and/or employees can call or chat in to connect with a counselor or community resource team member	
92	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health EAP and Student Support services are available 24/7/365 and high-risk crisis support is provided in an attempt to de-escalate the user or connect the appropriate first responders with them accordingly	
93	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health counselors assess users' mental health presenting issues and support them with coping skills and resources to help them improve their mental health over time. Virtual psychiatry services are available for diagnostic evaluations and medication management, but students must be referred in by a campus staff member. The latter is not a services student users can opt-in for, like 24/7 EAP or Student Support services.	
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	TELUS Health EAP and Student Support services are available for these populations, and contracts must be initiated through an institution or organization and TELUS Health to begin providing services.	*
95	Psychology, Social work, or Special Education Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	Students and/or employees can call or chat in to connect with a counselor or community resource team member	*
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	Students and/or employees can call or chat in to connect with a counselor or community resource team member	*
97	Crisis support, suicide prevention	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health EAP and Student Support services are available 24/7/365 and high-risk crisis support is provided in an attempt to de-escalate the user or connect the appropriate first responders with them accordingly	
98	Assessment or diagnostic services	<input checked="" type="radio"/> Yes <input type="radio"/> No	TELUS Health counselors assess users' mental health presenting issues and support them with coping skills and resources to help them improve their mental health over time. Virtual psychiatry services are available for diagnostic evaluations and medication management, but students must be referred in by a campus staff member. The latter is not a services student users can opt-in for, like 24/7 EAP or Student Support services.	

99	Speech	<input type="radio"/> Yes <input type="radio"/> No	Not available through TELUS Health
100	Occupational Therapy	<input type="radio"/> Yes <input type="radio"/> No	Not available through TELUS Health

**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](#) - Sourcewell RFP #072225 - TELUS Health Price Proposal 22JULY2025.docx.pdf - Tuesday July 22, 2025 12:22:46
- [Financial Strength and Stability](#) - 2024 ANNUAL REPORT.pdf - Thursday July 17, 2025 13:32:15
- [Marketing Plan/Samples](#) - TELUS Health Student Support\_EAP marketing asset samples.pdf - Tuesday July 22, 2025 09:11:40
- [WMBE/MBE/SBE or Related Certificates](#) - TELUS Supplier Diversity.pdf - Tuesday July 22, 2025 13:04:06
- [Standard Transaction Document Samples](#) - TELUS Health Student Support Services ORDER FORM 2025.pdf - Tuesday July 22, 2025 13:08:36
- [Requested Exceptions](#) - Sourcewell - TELUS Health Exceptions Table.pdf - Tuesday July 22, 2025 11:56:27
- [Upload Additional Document](#) - Sourcewell RFP 072225 - TELUS Health Proposal 22JULY2025.docx.pdf - Tuesday July 22, 2025 11:50:01

## 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. - Christine Mcguire, Senior Director, Business Development, TELUS Health (US) Ltd.

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
<b>Addendum 10 Virtual Behavioral Health Therapy 072225</b> Mon July 14 2025 04:53 PM	<input checked="" type="checkbox"/>	7
<b>Addendum 9 Virtual Behavioral Health Therapy 072225</b> Fri July 11 2025 03:02 PM	<input checked="" type="checkbox"/>	4
<b>Addendum 8 Virtual Behavioral Health Therapy 072225</b> Thu July 10 2025 07:01 AM	<input checked="" type="checkbox"/>	1
<b>Addendum 7 Virtual Behavioral Health Therapy 072225</b> Tue July 8 2025 08:39 AM	<input checked="" type="checkbox"/>	1
<b>Addendum 6 Virtual Behavioral Health Therapy 072225</b> Mon July 7 2025 09:58 AM	<input checked="" type="checkbox"/>	8
<b>Addendum 5 Virtual Behavioral Health Therapy 072225</b> Thu July 3 2025 10:04 AM	<input checked="" type="checkbox"/>	4
<b>Addendum 4 Virtual Behavioral Health Therapy 072225</b> Wed July 2 2025 11:46 AM	<input checked="" type="checkbox"/>	3
<b>Addendum 3 Virtual Behavioral Health Therapy 072225</b> Wed July 2 2025 11:45 AM	<input checked="" type="checkbox"/>	3
<b>Addendum 2 Virtual Behavioral Health Therapy 072225</b> Wed June 18 2025 11:27 AM	<input checked="" type="checkbox"/>	2
<b>Addendum 1 Virtual Behavioral Health Therapy 072225</b> Wed June 4 2025 08:22 AM	<input checked="" type="checkbox"/>	1