

**MASTER AGREEMENT # 040226****CATEGORY: Wellness Program Engagement, Open Enrollment Support and Related Services****SUPPLIER: HealthSource Solutions, LLC**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, Staples, MN 56479 (Sourcewell) and HealthSource Solutions, LLC, 3149 Fernbrook Lane North, Plymouth, MN 55447-5321 (Supplier).

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

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

**Article 1:  
General Terms**

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

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

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on May 14, 2030, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcwell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcwell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #040226 to Participating Entities. In Scope solutions include:
- a. Category 1: Wellness Program Engagement:**
- i. Wellness engagement programs and platforms;
  - ii. Biometric screening services and coordination;
  - iii. Wellness incentive management;
  - iv. Health coaching; and,
  - v. Wellness program management and related services, such as data analytics, predictive modeling, wellness program branding, strategic planning, and on-site wellness center management, but only to the extent that such services are complementary to a proposer's offering of the solutions described in 1. a. above.
- 8) **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.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **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.
- 11) **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.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.
- 13) 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.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.
- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

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

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

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

certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

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

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

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

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

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

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.

xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.

xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

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

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

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

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

## **Article 2: Sourcewell and Supplier Obligations**

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

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

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

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

Sourcewell's Authorized Representative is its Chief Procurement Officer.

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

The Report must contain the following fields:

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

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

- Participating Entity Contact Name;
  - Participating Entity Contact Email Address;
  - Participating Entity Contact Telephone Number;
- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
  - 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
  - 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations

defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included

Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 19) **Grant of License.**
- a) **During the term of this Agreement:**
    - i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.
    - ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.
  - b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.
  - c) **Use; Quality Control.**
    - i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
    - ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.
  - d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.
- 20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in

court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

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

subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

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

### **Article 3: Supplier Obligations to Participating Entities**

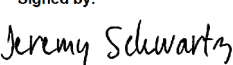
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject,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

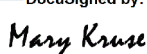
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier’s standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity’s unique Sourcewell account number.
  
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
  
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
  
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

HealthSource Solutions, LLC

Signed by:  
  
 C0FD2A139D06489...

DocuSigned by:  
  
 32A1EF5C5B31409...

By: \_\_\_\_\_

By: \_\_\_\_\_

Jeremy Schwartz

Mary Kruse

Title: Chief Procurement Officer

Title: CEO/Owner

Date: 5/12/2026 | 6:52 AM PDT

Date: 5/12/2026 | 6:38 AM PDT

# RFP 040226 - Wellness Program Engagement, Open Enrollment Support and Related Services

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## Vendor Details

Company Name: HealthSource Solutions, LLC  
Does your company conduct business under any other name? If yes, please state: HealthSource Solutions  
Address: 3149 Fernbrook Lane North  
Plymouth, MN 55447  
Contact: Zach Harris  
Email: zachharris@healthsource-solutions.com  
Phone: 256-975-6239  
Fax: 763-287-0789  
HST#: 26-4247212

## Submission Details

Created On: Monday March 16, 2026 15:00:00  
Submitted On: Monday April 06, 2026 12:31:49  
Submitted By: Zach Harris  
Email: zachharris@healthsource-solutions.com  
Transaction #: 8891f361-04a2-4694-9cd7-7c0e36a89a86  
Submitter's IP Address: 10.13.1.17

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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.

#	Question	Response *
1	Provide the legal name of the Proposer authorized to submit this Proposal.	HealthSource Solutions, LLC
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Yes
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute master agreement with Sourcewell).	US Wellness; eHealth Screenings (Both are vendor/partners that will deliver on-site biometrics screening services as needed outside our covered areas.)
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE Code: 66AF0 UEI: RHWXBZU7AHE8
5	Provide your NAICS code applicable to Solutions proposed.	541611- Administrative Management and General Management Consulting Services 541990- All Other Professional, Scientific, and Technical Services 561210- Facilities Support Services 611620-

	SportsandRecreationInstruction 621999- AllOtherMiscellaneousAmbulatoryHealthCareServices 713940- FitnessandRecreationalSportsCenters 812199- OtherPersonalCareServices 812990- AllOtherPersonalServices
6 ProposerPhysicalAddress:	3149FernbrookLaneNorth,Plymouth,MN55447-5321
7 Proposerwebsiteaddress(oraddresses):	https://www.healthsource-solutions.com
8 Proposer'sAuthorizedRepresentative(name,title,address,emailaddress&phone)(Therepresentativemusthaveauthoritytosignthe“Proposer’sAssuranceofCompliance”onbehalfoftheProposer):	Name:MaryKruse Title:CEO/Owner Address:3149FernbrookLaneNorth,Plymouth,MN55447-5321 Email:marykruse@healthsource-solutions.com Phone:763-287-0749
9 Proposer'sprimarycontactforthisproposal(name,title,address,emailaddress&phone):	Name:ZachHarris Title:SalesConsultant Address:3149FernbrookLaneNorth,Plymouth,MN55447-5321 Email:zachharris@healthsource-solutions.com Phone:256-975-6239
10 Proposer'sothercontactsforthisproposal,ifany(name,title,address,emailaddress&phone):	Name:CrystalMiller Title:COO Address:3149FernbrookLaneNorth,Plymouth,MN55447-5321 Email:crystalmiller@healthsource-solutions.com Phone:763-287-0748

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

# Question	Response *
1 Provideabriefhistoryofyourcompany,includingyourcompany’sscorevalues,businessphilosophy,andindustrylongevityrelatedtotherequestedSolutions.	HealthSourceSolutionshasbeenprovidinghigh-quality,high-touchworksithehealthpromotionandonsitestaffingservicesforover35years.HealthSourceSolutionswillbereferencedas“HealthSource”throughoutthisdocument.  From1979-

2009 Park Nicollet Health Source was a department within Park Nicollet Health Services. As part of a long-term strategy, in the spring of 2009 Park Nicollet Health Services divested the Health Source department. At the time Mary Kruse, who had spent 18 years with Park Nicollet Health Source, transitioned the business to private ownership, establishing Health Source Solutions on April 9, 2009. During the transition, 95% of the staff and 98% of clients chose to continue working with Health Source Solutions. Health Source Solutions has celebrated 17 years in business, however many of our clients have been with us much longer. The three longest clients are 3M at 33 years, Medtronic at 29 years, and Cargill at 24 years.

On July 1, 2025 Health Source acquired On Site Solutions, a wellness company based in Grand Rapids, MI. With the acquisition we acquired 70 new clients and 10 additional staff.

Our core values are:

- Instill Trust—conduct ourselves in a professional, ethical, honest manner
- Lead with Passion—bring enthusiasm, meaning and focus to our work
- Build Meaningful Relationships—connect with mutual respect, kindness and inclusivity
- Make an Impact—bring forth solutions to empower change and make a difference
- Enjoy the Journey—embrace growth and bring joy and optimism to the work we do each day

**Our Purpose:** We believe every employee deserves a workplace that fuels their well-being and helps them thrive, and we believe too many are being left behind.

**Our Differentiator:** We engage employees who are often the hardest to reach by combining direct communications, manager and safety partnerships, high visibility, all with a genuine human connection. We listen first, tailor solutions to reach a wide demographic, and provide a responsive, relationship-driven approach that evolves as the program grows. We take on the work load so you can focus on other priorities.

**Our Offerings:**

We design and deliver customized well-being programs that integrate technology, human support, and actionable insights. Clients receive a comprehensive, fully managed solution including tailored initiatives, strategic guidance, engagement support, and results-based reporting. Every program is practical, personal, and adaptable, helping employees at every level thrive.

We embed experienced well-being professionals into your workplace to bring wellness to life where it matters most—person-to-person. Your on-site specialist becomes your trusted partner on the ground building relationships, driving engagement, and delivering pr

	<p>ogrammingtailoredtoyourculture,workforceandindividualneeds. Theirhighvisibilityandhumanconnectionhelpemployeesateveryl evelfeelsupported,connected,andempoweredtothrive.</p>
<p>1 What are your company's expectations in the event of an award?</p>	<p>Ourexpectationistobuilduponthestrongfoundationandrelationships establishedasapreviouslyawardedSourcewellsupplier. Throughthisexperience,wehavedevelopedaclearerunderstandingofh owtoeffectivelyleverageandoperationalizethecontract.</p> <p>InadditiontotheservicesweprovideSourcewell'sBetterHealthColl ective,ourcurrentbookofbusinessisheavilyweightedinthepublics ector. Weexpecttoleverageanewsupplierawardforretentionofclie ntsandgrowingnewbusiness. Weembracetheopportunitytooffer moreadvancedandcustomizedservices.</p>
<p>1 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. <b>DONOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.</b></p>	<p>HealthSource is under private ownership and will not provide personal financial statements which will become public domain. We are currently a debt free company, do not have SEC filings or credit/bond ratings. The business has run completely debt free for the past five years, and 100% of revenues have been reinvested back into the business to support our growth strategy. We are in sound financial standing. Please see the letter of reference from Bell Bank which we have done business with for the past 17 years.</p>
<p>1 What is your US market share for the Solution that you are proposing?</p>	<p>As a small business it is difficult for us to quantify our exact US market share. However, we currently service approximately 175 clients of which 20% are public sector, 14% are education and 3% are non-profit. The HealthSource book of business includes small businesses up to Fortune 500 companies and a large Federal government.</p>
<p>1 What is your Canadian market share for the Solution that you are proposing?</p>	<p>We do not currently have clients in Canada but believe many of our services would support this market as well.</p>
<p>1 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>HealthSource does not have any current or completed bankruptcy proceedings in the organization's history.</p>
<p>1 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 product.</p>	<p>We are best described as a service provider.</p> <p>b) HealthSource is a privately owned service provider. The sales and service force are employees of HealthSource. Our employees are the primary delivery team for the services proposed.</p> <p>We have three other major partners that we leverage to provide seamless service to our clients throughout the United States.</p> <p>1. We partner with WellRight, LLC as a reseller of their portal solution.</p>

<p>cts proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>HealthSource, directly manages the sales and delivery of the portals solution.</p> <p>2. We partner with US Wellness and eHealth Screening to provide biometric screenings outside of our regional biometric service area of MN, WI, SD, MI, OH, and KY. As our partner, they handle the staffing and implementation of the screening services. We assist in coordinating these screenings between the organization and the delivery teams.</p> <p>3. While we can offer on-site health coaching, we partner with Marque eHealth for telephonic health coaching services. They integrate with the wellness portal platform for a smooth user experience and service delivery.</p>
<p>1 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>Licenses and certifications held by HealthSource Solutions:</p> <p>Clinical Laboratory Improvement Amendment (CLIA) – Certificate of Waiver:          Certifies that the laboratory will perform procedures that have been approved as waived tests by the Department of Health and Human Services.</p> <p>NCQA Wellness and Health Promotion Certified: (Health Portal)          The NCQA Wellness and Health Promotion Certification is a targeted review of specialized programs that help employers select wellness vendors closely aligned with their priorities.</p> <p>SOC2: (Health Portal)          WellRight has achieved a SOC2 Type 2 attestation. WellRight performs an annual cyber risk assessment following the National Institute of Standards and Technology Cybersecurity Framework ("NIST CSF"), which includes identifying and ranking threats relative to security impacts to the system. Action plans are developed when warranted.</p>
<p>1 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 Source well if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.</p>	<p>No current or past debarments or suspensions.</p>
<p>2 Describe any relevant industry award or recognition that your company has received in the past five years.</p>	<p>Relevant industry awards and recognition:          Healthiest Employer of Minnesota          American Heart Association Workforce Well-being          MSP Wellness Champion          Mental Health America Bell Seal Recognition          WELCOA Silver Award          Enterprising Women of the Year Award - Mary Kruse owner</p>
<p>2 What percentage of your sales are to the governmental sector in the past three</p>	<p>Approximately 30% of our sales have been in the governmental sector in the past three years. With the acquisition in 2025, the percentage</p>

eeyears?	increasedto35%.
2 Whatpercentageofyoursalesaretot 2 heeducationsectorinthepastthree ears?	Approximately4%ofoursaleshavebeenintheeducationsectorinth epastthreeyears.
2 Listallstate,cooperativepurchasing 3 agreementsthatyouhold.Whatisthe annualsalesvolumeforeachofthese agreementoverthepastthreeyears?	SourcewellistheonlycooperativepurchasingagreementthatHealth Sourceholds(SupplierAward#051922- HSS).Theannualsalesvolumeforthisagreementoverthepastthree eyearstotals\$525,000.
2 ListanyGSAcontractorsStandingOff 4 ersandSupplyArrangements(SOSA )thatyouhold.Whatistheannualsale svolumeforeachofthesecontractsov erthepastthreeyears?	NocurrentGSAcontractorsStandingOffersandSupplyArrangem ents.

**Table 2B: References/Testimonials**

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

Entity Name *	Contact Name *	Phone Number *
BetterHealthCollective- Sourcewell(Account#5511)	LoriHiltner(HRSpecialist,BenefitsAdmini stration)	218-895-4150
MetropolitanAirportsCommission(Account #21164)	AmyPetruck(BenefitsAdministrator)	612-726-5393
CityofMinneapolis(Account#18518)	MelodyWest(HRWellnessSpecialist)	612-895-4185
BrookingsSchoolDistrict5- 1(Account#1570)	AndreaFish(HRWellnessSpecialist)	605-696-4330

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

Describe your company’s capability to meet the needs of Sourcewell 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.

# Question	Response *
2 Salesforce. 6	TheHealthSourceSolutionsalesteamisstructuredtoprovidebot hstrategicleadershipandlocalized,relationship- drivengrowth.TheteamincludesaDirectorofBusinessDevelopm entandthreeSalesConsultants,eachresponsiblefordefinedgeog raphicterritoriestoensurestrongmarketpresenceandclientrespo

	<p>nsiveness.</p> <p>OneSalesConsultantservesasthededicatedSourcewelllead,actingastheinternalsubjectmatterexpertoncooperativepurchasing.InpartnershipwiththeDirectorofBusinessDevelopment,thisindividualsupportsthebroadersalesteambyguidingSourcewell-relatedconversations,educatingprospectiveclientsonthevalueandprocessofcooperativepurchasing,andhelpingalignopportunitieswithineachconsultant'sterritory.</p> <p>ThesalesteamisfurtherstrengthenedbytheactiveinvolvementoftheHealthSourceleadershipteamandDirectorsofOperations.Thiscross-functional support ensures alignment between sales strategy and servicedelivery,providesoperationalinsightduringthesalesprocess,andreinforcesourabilitytodelivertailored,high-qualitysolutionsthatmeetclientneeds.</p>
<p>27 Describe thenetworkof Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.</p>	<p>Health Source does not have dealers or distributors, but does work very closely with the health insurance broker market.</p>
<p>28 Service force.</p>	<p>The Health Source service team is comprised of 50 full-time professionals and an additional 45 on-call and part-time staff, allowing us to deliver both consistent program management and scalable support based on client needs.</p> <p>Our service team is structured to ensure both strategic oversight and high-quality day-to-day execution:</p> <ul style="list-style-type: none"> <li>• Director of Service Lines: Provides strategic leadership of the service line, client contract oversight, management of service delivery teams and serves as a senior consultant to guide strategic planning, program structure, and key deliverables.</li> <li>• Health Promotion Managers: Lead client relationships and oversee the execution of services.</li> <li>• Senior Account Specialists: Support program oversight and are responsible for coordinating and delivering key program components.</li> <li>• Account Specialists: Serve as frontline staff, supporting Health Promotion Managers and Senior Account Specialists in delivering services and engaging participants.</li> <li>• Part-time and On-Call Staff: Provide flexible support for biometrics screening events and group fitness instruction, enabling us to scale efficiently based on demand.</li> </ul> <p>We prioritize succession planning and professional development across all levels of the organization. This intentional focus allows us to proactively grow our team, maintain continuity of service, and ensure long-term client satisfaction.</p> <p>Our service delivery model is designed for flexibility, regular reach, timely responses, continuity of service all with the capability to provide</p>

	<p>eservicesacrosstheUnitedStatesandCanada.</p>
<p>2 Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.</p>	<p>All orders are managed directly by HealthSource Solutions staff to ensure a seamless and responsive client experience.</p> <p>Clients may connect with our team through a dedicated phone line, direct email access, or a Sourcewell contact webpage hosted on our website. All inquiries are routed to our designated Sourcewell Sales Consultant or the Director of Business Development, ensuring prompt and knowledgeable support.</p> <p>Through this process, clients can expect:</p> <ul style="list-style-type: none"> <li>• Prompt Acknowledgement: Confirmation of service requests within 12 business hours.</li> <li>• Discovery Meeting: A consultative discussion to understand goals, challenges, and desired outcomes. Based on this dialogue, we recommend tailored solutions aligned with both budget and organizational priorities.</li> <li>• Sales Consultation: The opportunity to explore specific services or solutions in greater detail.</li> <li>• Service Confirmation: Clear next steps based on the scope of work, including either a Letter of Agreement (outlining services and timelines) or SOW (defining terms and obligations).</li> </ul> <p>We prioritize responsiveness and efficiency, with a goal of scheduling initial meetings within one week of the client's request.</p>
<p>3 Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.</p>	<p>HealthSource Solutions is committed to delivering responsive, high-touch service to every client. Our standard customer service model includes:</p> <ul style="list-style-type: none"> <li>• Timely Response: All client inquiries are responded to within one business day.</li> <li>• Dedicated Support Team: Each client is assigned a dedicated support team with at least two primary contacts, ensuring accessibility and continuity for questions, concerns, or requests.</li> <li>• End-User Support: Our support team is available to participants via phone or email Monday–Thursday from 7:30AM–4:30PM CST and Friday from 7:30AM–4:00PM CST. All inquiries receive a response within one business day.</li> <li>• Ongoing Account Management: Client support teams meet with designated client contacts on a monthly or agreed-upon cadence to provide updates, review progress, and align on next steps.</li> <li>• Escalation Support: The Director of Worksite Services proactively engages if any service delivery concerns arise, ensuring timely resolution and client satisfaction.</li> <li>• Continuous Feedback: Annual client satisfaction surveys are conducted to assess performance, gather insights, and continuously improve our services.</li> </ul>
<p>3 Describe your ability and willingness to</p>	<p>HealthSource Solutions is fully prepared to provide products and se</p>

<p>1 Provide your products and services to Sourcewell participating entities.</p>	<p>Services to all Sourcewell participating agencies, including government, education, nonprofit, and other eligible organizations.</p> <p>We deliver services nationwide, with the majority of offerings available remotely from our headquarters. In addition, we offer a robust on-site staffing model, placing full-time HealthSource professionals directly within client organizations.</p> <p>Our team is equipped to support on-site staffing across states by establishing business operations as needed, including managing state-specific requirements such as tax registration and workers' compensation compliance. This ensures a seamless and compliant experience for our clients.</p> <p>Importantly, on-site staffing is offered as a stand-alone service and is not dependent on the purchase of additional services (e.g., a health portal), providing flexibility to meet each organization's unique needs.</p>
<p>3 Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.</p>	<p>Although we do not currently service the Canadian market, we are capable and eager to provide our products and services within Canada.</p>
<p>3 Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.</p>	<p>All geographic areas in the United States can be serviced. Services in Canada would be limited to Wellness Program Management and the Health Portal.</p>
<p>3 Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.</p>	<p>HealthSource will provide full access of our solutions to all types of participating entities.</p>
<p>3 Define any specific requirements or restriction that would apply to our participating entities in Hawaii and Alaska and in US Territories.</p>	<p>HealthSource cannot provide on-site staffing in U.S. Territories or Canada.</p>
<p>3 Will Proposer extend terms of any awarded master agreement to non-profit entities?</p>	<p>Yes, we work with several non-profits and tribal entities.</p>

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

# Question	Response *
<p>3 Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.</p>	<p>HealthSource Solutions integrates marketing and sales to ensure consistent, targeted outreach and maximum visibility of this opportunity. See the upload section for examples of marketing materials samples.</p> <p>Our marketing strategy focuses on four primary channels:</p>

	<p><b>1. Digital Presence</b>                  We leverage our website as a central hub, featuring dedicated pages for Sourcewell, Public Sector, and Education audiences. These pages prominently highlight the Sourcewell partnership and clearly communicate available solutions:                  • <a href="https://www.healthsource-solutions.com/brokers-consultants/sourcewell/">https://www.healthsource-solutions.com/brokers-consultants/sourcewell/</a>                  • <a href="https://www.healthsource-solutions.com/solutions/wellness-for-government-organizations-sourcewell/">https://www.healthsource-solutions.com/solutions/wellness-for-government-organizations-sourcewell/</a></p> <p><b>2. Conference &amp; Event Marketing</b>                  We actively promote Sourcewell through conference exhibiting, incorporating Sourcewell collateral and table flag to increase awareness among target audiences.</p> <p><b>3. Targeted Email Campaigns</b>                  We conduct focused email outreach to current and prospective public sector clients, elevating Sourcewell as a streamlined contracting solution and reinforcing its value.</p> <p><b>4. Customized Marketing Materials</b>                  We have developed a government-specific flyer to clearly communicate the benefits of partnering through Sourcewell. Our public sector capabilities statement also highlights Sourcewell as a potential contracting vehicle.</p>
<p>3 Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.</p>	<p>Our experience with digital marketing and data-driven outreach has produced mixed results. Our marketing team is intentionally shifting our strategy toward relationship-driven growth. This includes prioritizing broker partnerships, referrals, and direct engagement within our target markets.</p> <p>While digital channels are not our primary sales driver, they play an important supporting role. Our efforts are focused primarily on LinkedIn, targeted email campaigns, and website blogs. We use these channels to elevate thought leadership, reinforce our brand, and show case our expertise within the public sector and education markets.</p> <p>The data we collect such as impressions, clicks, and conversions help us to improve our marketing efficacy in future campaigns.</p>
<p>3 In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?</p>	<p>Sourcewell plays a key role in educating and activating the market, particularly with insurance brokers and consultants, on how cooperative contracts simplify procurement and expand access to wellness services. Continued efforts to position Sourcewell as a collaborative partner, not a competing entity, will help increase adoption.</p> <p>HealthSource integrates Sourcewell into our sales process through consistent education, visibility, and alignment with key stakeholders:</p> <ul style="list-style-type: none"> <li>• <b>Early introduction:</b> All public sector and education prospects that reach out are asked if they have a Sourcewell contract. If unfamiliar, a follow-up link to our Sourcewell liaison is provided.</li> <li>• <b>Broker engagement:</b> We proactively inform brokers of our Source</li> </ul>

	<p>well contract and connect them with Sourcewell representatives to support understanding and adoption.</p> <ul style="list-style-type: none"> <li>• Utilizing the Sourcewell Supplier lists: we are working the list by targeting specific regions and demographics. We reach out to HR and benefits leaders to introduce our services.</li> <li>• Stakeholder alignment: Wellness services are often initiated through a broker, so we guide HR and benefits leaders to utilize their procurement team to leverage Sourcewell contracts.</li> <li>• Government Sites/RFPs: We include our Sourcewell contract number in all our site registrations, proposals, and RFP responses.</li> <li>• Market outreach: We participate in procurement events and targeted outreach to government entities to promote contract utilization.</li> <li>• Strategic support: We leverage partnerships, such as APEX, to identify and pursue government contracting opportunities.</li> </ul> <p>This approach ensures Sourcewell is consistently positioned as a streamlined, value-added purchasing option across all stages of the sales process.</p>
<p>4 Are your Solutions available through a One- procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.</p>	<p>HealthSource does not use an e-procurement ordering process.</p>

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

# Question	Response *
<p>4 Describe any product, equipment, maintenance, or operator training program that you offer to Sourcewell participating entities. Include details, such as whether the training is standard or optional, who provides training, and any costs that apply.</p>	<p>The only optional training we include is after a participating entity purchases our services. The training is for the point of contact at the participating entity on the health portal administrator access and tools. This is included at no additional cost to a participating entity with a contract. The training is optional because our internal account team will handle all administrative duties and reporting for the participating entity's point of contact.</p>
<p>4 Describe any technological advances that your proposed Solution offer.</p>	<p>Our wellness portal differentiates itself through innovative communication and accessibility features designed to reach all employees—especially those who may not regularly engage with a traditional web-based portal or mobile app. These advancements reduce barriers to participation, expand reach across diverse employee populations, and enable a more personalized, data-driven well-being experience.</p> <p><b>Text-Based Engagement &amp; Tracking</b></p> <ul style="list-style-type: none"> <li>• Program Updates via Text: Timely, targeted messages keep wellness initiatives visible and drive ongoing participation.</li> <li>• Text-</li> </ul>

	<p>Based Activity Tracking: Participants can log progress in challenges via text, removing barriers to entry and eliminating the need to access a platform or app.</p> <p>Wearable &amp; Rewards Integration</p> <ul style="list-style-type: none"> <li>• Integrates with most major wearable fitness devices/appsto automate activity tracking.</li> <li>• Built-in Rewards Mall enables streamlined incentive management and fulfillment within the platform with over 50 merchant options available.</li> </ul> <p>AI-Driven Personalization</p> <ul style="list-style-type: none"> <li>• Emerging AI capabilities enhance content recommendations, communications, and user journeys.</li> <li>• Creates a more relevant, individualized experience that adapts to participant behaviors and preferences.</li> </ul> <p>Advanced Segmentation &amp; Customization</p> <ul style="list-style-type: none"> <li>• Highly configurable platform allows targeted delivery of communications, programs, rewards, and resources.</li> <li>• Supports population-specific strategies to increase engagement and program effectiveness.</li> </ul> <p>Flexible, User-Friendly Access</p> <ul style="list-style-type: none"> <li>• Available via both web and mobile app, ensuring a seamless experience across devices.</li> <li>• Intuitive design supports ease of navigation and quick action from first login.</li> </ul>
<p>4 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>HealthSource Solutions does not maintain formal “green” initiatives tied directly to our services; however, we actively support and align with our clients’ sustainability and well-being efforts.</p> <p>We actively promote and support client-led environmental and well-being initiatives through our programming and communications. This includes highlighting efforts such as Earth Day activities, Bike to Work campaigns, walking challenges in regard to commuting, recycling initiatives such as anoplastic challenge, and others sustainability-focused events such as limiting printed materials and prioritizing electronic communications whenever possible. We also use environmentally friendly (“green”) cleaning and sanitation products when provided by our clients.</p> <p>We incorporate sustainability principles when collaborating with on-site partners, such as cafeterias. When refreshments are offered at events like health fairs, screenings, or educational sessions, we encourage options that are healthy, responsibly sourced, and environmentally friendly.</p>
<p>4 Identify any third-party issued eco-labels, ratings or certification that your company has received for the Solution included in your Proposal related to energy efficiency or conservation, life-cycledesign (cradle-to-</p>	<p>HealthSource does not currently have an official sustainability policy. However, we do aim to use sustainable business practices to minimize our environmental footprint.</p>

<p>cradle), or other green/sustainability factors.</p>	
<p>4 What unique attributes do 5 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>HealthSource Solutions is a wellness partner—not a technology company selling wellness. Our unique strength is focusing on both organizational and individual wellbeing, recognizing that a supportive culture is critical to driving sustainable behavior change.</p> <p>Our fractional wellness program management model is unique in the market. We act as your behind-the-scenes wellness expert, taking on much of the administrative workload and relieving the burden on HR. Beyond portal guidance and planning, we support key areas such as policy alignment, environmental initiatives (e.g., bike racks, walking paths), and leadership engagement.</p> <p>We understand that engagement can be a challenge, which is why we intentionally design strategies to reach employees who are often the hardest to engage. Through direct communication, partnerships with managers, integration across departments (e.g., safety, risk management, ERGs), and a genuine human connection, we ensure no group is overlooked.</p> <p>Without our fractional support, clients receive a fully managed solution that includes strategic guidance, tailored initiatives, engagement support, and results-based reporting. Every program is practical, personal, and adaptable—helping organizations embed wellbeing into their culture and ensuring employees have the opportunity to thrive.</p> <p>Our client support team delivers high-quality, real-time support from experienced professionals.</p> <ul style="list-style-type: none"> <li>• All account representatives hold degrees in health and wellness-related fields.</li> <li>• Each representative brings 4+ years of experience, supported by managers with 10+ years of expertise.</li> <li>• Our team has had zero internal staff turnover over the past five years, ensuring consistent and reliable service for clients.</li> <li>• A dedicated participant-facing customer service line is available to assist end users with program and technology questions.</li> </ul>
<p>4 Describe your technology 6 as it is related to your proposed solutions. Include the technology for the agency and the person utilizing the services.</p>	<p>HealthSource leverages multiple technology systems based on the services provided.</p> <p>Our wellness portal is a robust, highly customizable platform designed to align with each organization's wellness goals and program needs. Powered by WellRight, the portal is accessible via both web and mobile app. Key features include text-based engagement and tracking, wearable devices and rewards integration, AI-driven personalization, and advanced segmentation. Additional details are provided in responses 42 and 79.</p> <p>The portal supports single sign-on (SSO) for seamless access and can quickly link to internal resources such as health insurance portals, EAP services, retirement plan vendors, etc.</p>

	<p>We have optional add-on services, including on-demand fitness classes and telephonic health coaching, each supported by intuitive technology for easy participant navigation.</p> <p>These technologies integrate to track participant engagement across various programs. If desired, clients may be granted administrative access to run reports as needed.</p> <p>For on-site biometrics screenings, we utilize proprietary tracking technology to streamline participant registration, track screening outcomes, provide year-over-year comparison reports and build aggregate summary reports.</p>
<p>4 Describe or upload case studies or stories where your solutions impacted the people using it.</p>	<p>We have provided three case studies demonstrating our impact on the people using it for a municipality, a school district, and an airport commission. Each had unique needs and goals that we were able to support through our fitness center management programming, fractional wellness support, and on-site wellness program management. The full case studies can be found in the uploaded documents.</p>
<p>4 Describe your use of AI in your company and in the solutions you provide.</p>	<p>HealthSource utilizes licensed AI platforms to support select business functions, such as writing, business analysis and marketing. We are actively exploring secure, responsible, and efficient ways to expand the use of AI across our organization.</p> <p>Within our solutions, the wellness portal incorporates AI-driven personalization informed by health risk assessments and biometric data. This enables the platform to recommend targeted education, activities, and interventions based on each participant's specific health risks.</p> <p>AI-Driven Personalization:</p> <ul style="list-style-type: none"> <li>• Enhances content recommendations, communications, and user journeys</li> <li>• Delivers a more relevant, individualized experience that adapts to participant behaviors and preferences</li> </ul> <p>The portal's AI development roadmap includes continued advancements in WellPath data optimization, conversational health navigation, AI copilots, multi-modal interactions, contextual intelligence, and proactive intervention capabilities.</p>
<p>4 What security protocols do you have for your technology and the information in it?</p>	<p>WellRight has risk-based InfoSec and Privacy Programs that have been developed to ensure compliance with requirements such as HIPAA. Our Business Associates Agreement is posted at <a href="https://www.wellright.com/agreements-and-terms">https://www.wellright.com/agreements-and-terms</a>. Our entity is in compliance with these terms and will execute the BAA during the contracting.</p> <p>The WellRight system is fully HIPAA, ADA, and SOC2 Type 2 compliant. All Personal Health Information (PHI) and Personal Identifying Information (PII) data is encrypted at rest. Assistance can also be provided through WellRight for member services with disabilities. WellRight manages the alternative standard process for wellness requirements, on behalf of the customer to ensure all employee PHI or outcomes data is protected from the employer. Only participation data is provided, along with aggregate results. WellRight has a certified Head of Information Security and Privacy professional in charge of the organization's Information Security &amp;</p>

	<p>Privacy programs. Operational security responsibilities are performed across various business units and qualified third party providers.</p> <p>Client information is encrypted in transit using TLS and SHA256. Encryption at rest is deployed at the volume level via AES256 for the database and backup. Additionally, client password information is encrypted at the database level. WellRig ht's database servers are backed up daily. The backups are stored on AWS's S3 data storage service.</p> <p>Information Security administrative controls have been embedded into the Health Source HR process. Some of those controls include background checks and monthly security and privacy awareness training for employees and temporary workers. Relevant data security and protection obligations are documented in agreements with contractors.</p>
<p>5 Describe the options available to reward people with health incentives.</p>	<p>Health Source manages health incentives through our wellness portal, wellness program management services, and on-site staffing.</p> <p>Our wellness portal tracks completion of incentivized activities and supports a wide range of reward structures, including premium differentials, HSA contributions, prize drawings, and gift cards. The platform features a built-in rewards mall, offering employees a variety of retail and charitable donation options for redeeming gift cards.</p> <p>The rewards mall can also be customized to include organization-specific incentives such as PTO hours or days, company swag, volunteer time, and charitable donations. Incentives can be tailored to specific employee populations, demographics, or organizational goals.</p> <p>Through our highly customizable approach, we partner with organizations to design incentive programs that align with business objectives while supporting employees in achieving their personal health goals.</p>

**Table 5B: Value-Added Attributes**

#	Question	Certification	Offered	Comment
51	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certification 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.		Yes No	Relevant documentation has been uploaded for the entity designation selected below (WBE, SBE, WOSB).
52		Minority Business Enterprise (MBE)	Yes No	N/A
53		Women Business Enterprise (WBE)	Yes	Yes. Health Source has been a WBE since 2017. ○

		No	
54	Disabled-Owned Business Enterprise (DOBE)	Yes No	N/A
55	Veteran-Owned Business Enterprise (VBE)	Yes No	N/A <input type="radio"/>
56	Service-Disabled Veteran-Owned Business (SDVOB)	Yes No	N/A
57	Small Business Enterprise (SBE)	Yes No	Yes. HealthSource has been a SBE since 2011. <input type="radio"/>
58	Small Disadvantaged Business (SDB)	Yes No	N/A
59	Women-Owned Small Business (WOSB)	Yes No	Yes. HealthSource has been a WOSB since 2017. <input type="radio"/>

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

Provide detailed pricing information in the questions that follow below.

#	Question	Response *
60	Describe your payment terms and accepted payment methods.	Standard payment terms are 30-day Net. During contract signing, an extension on NET due terms can be discussed.  Payment methods accepted are: ACH direct deposit, checks, or credit cards (3.5% transaction fee).
61	Describe any leasing or financing options available for use by educational or governmental entities.	Not applicable to our services.
62	Describe any standard transaction documents that you use.	We utilize Statements of Work (SOW) to define

<p>2 Do you use in connection with an awarded agreement (or performs, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.</p>	<p>the exact services being provided and confirm pricing. We have uploaded a sample SOW document.</p>
<p>6 Do you accept the P-3 card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?</p>	<p>Not at this time.</p>
<p>6 Describe your pricing model (e.g., line-4 item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.</p>	<p>Because pricing varies by service, please see the uploaded pricing sheet for detailed information on the Sourcewell discounted price. Product-category discounts are noted in the pricing sheet for each service line.</p>
<p>6 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.</p>	<p>Each service we offer has a discount based on market rates. The discount is also noted on the pricing document.</p> <p>Wellness Program Management-8% discount                  Health Portal-5% discount                  Onsite staffing-2% discount                  Biometric Screenings-2% for Minnesota and Michigan entities                  Collaborative Package-10% discount</p>
<p>6 How do you measure effectiveness and report outcomes?                  6 Describe how the effectiveness of your solution generates savings to agencies that use your services.</p>	<p>Health Source measures program effectiveness through a framework aligned with each organization's goals and desired outcomes. In partnership with the organization, we establish key performance indicators (KPIs) across program infrastructure, engagement, cultural shifts, health outcomes, and leadership involvement. This helps track individual and organizational progress and drive continuous improvement.</p> <p>Portal reports provided include:</p> <ul style="list-style-type: none"> <li>• Enrollment and participation rates</li> <li>• Monthly engagement and active users</li> <li>• Platform utilization (logins, access method, device integration)</li> <li>• Challenge participation and incentive progress</li> <li>• Aggregate HRA and biometric data (if applicable)</li> <li>• Year-over-year trends</li> </ul> <p>Wellness Program Management reports are based on a Value on Investment (VOI) framework, which measures both outcomes and organization</p>

	<p>onal impact. Health Source assesses culture shift through:</p> <ul style="list-style-type: none"> <li>• Employee perception of support and care</li> <li>• Leadership engagement and visibility</li> <li>• Cross-functional alignment (HR, Safety, Benefits)</li> <li>• Reaching hard-to-engage populations</li> <li>• Integration of wellbeing into policies and daily operations</li> </ul> <p>Based on the Health Source book of business, sustained engagement with our public sector client typically meets or exceeds an average engagement rate of 65%, which serves as a key indicator of cultural adoption. There is also higher utilization of existing benefits.</p> <p>Although difficult to measure, industry research affirms program effectiveness is aligned with reduced healthcare costs via regular preventive care and early risk detection; decreased absenteeism and improved productivity; lower turnover and recruitment costs, and improved workforce performance and engagement.</p> <p>Organizations with strong cultural alignment to wellbeing initiatives experience more sustained outcomes, resulting in long-term cost containment and improved organizational performance.</p> <p>Health Source's approach ensures wellness is implemented not as a stand-alone program, but as a strategic lever that delivers measurable value and strengthens organizational culture.</p>
<p>6 Describe any contribution or subsidy you will apply toward 7 the health incentives for participants of a participating entity's wellness program.</p>	<p>No contributions or subsidies will be provided by Health Source towards health incentives for a participating entity's wellness program because incentives are often tied to health insurance premiums or internal client gift malls.</p>
<p>6 Describe any quantity or volume discounts or rebate programs 8 that you offer.</p>	<p>Volume discounts are part of the Health Portal pricing on the attached pricing sheet.</p>
<p>6 Describe any performance guarantees. Explain the methods 9 used to report projections and measurable outcomes. Also, provide examples in the upload section.</p>	<p>Yes we can offer performance guarantees, although this is not a standard practice.</p> <p>Potential performance guarantees may include:</p> <ul style="list-style-type: none"> <li>• On-time delivery of communications, implementation materials, and project timelines</li> <li>• Response to client inquiries within one business</li> </ul>

	<p>sday</p> <ul style="list-style-type: none"> <li>•Deliveryofparticipationreportswithin48hours ofrequest</li> <li>•Deliveryofquarterlyandannualreportswithin 30daysofthereportingperiodclose</li> </ul> <p>HealthSourceisopentodiscussingandcustom izingaperformanceguaranteestructureifselec tedasthewellnessvendor.</p>
<p>7 Proposeamethodoffacilitating“sourced”productsorrela 0tedservices,whichmaybereferredtoas“openmarket”ite msor“non- contracteditems”.Forexample,youmay supplysuchitem s“atcost”or“atcostplusapercentage,”oryoumay supplya quoteforeachsuchrequest.</p>	<p>Notapplicabletoourservices.</p>
<p>7 Identifyanyelementofthetotalcostofacquisitionthat isN 1OTincludedinthepricingsubmittedwithyourresponse. T hisincludesalladditionalchargesassociatedwithapurch ase that are not directly identified as freight or shipping char ges. Fore example, list costs for items like pre- delivery inspection, installation, setup, mandatory trainin g, or initial inspection. Identify any parties that imposesuch costs and their relationship to the Proposer.</p>	<p>Generallynotapplicable. Thereareinstancesw hentravelcostsandperdiemareappliedasapa ss-throughitem.</p>
<p>7 If freight, delivery, or shipping is an additional cost to the So 2urcewell participating entity, describe in detail the complet e freight, shipping, and delivery program.</p>	<p>Werarelyshipphysicalproducts, mostexchang esaredoneelectronically. If shipping is neces sary we use standard carriers like USPS, UPS, or FedEx.</p>
<p>7 Specifically describe freight, shipping, and delivery terms 3 or programs available for Alaska, Hawaii, Canada, or any o ffshoredelivery.</p>	<p>Werarelyshipproducts, mostexchangesared onelectronically. If printing was needed we woul d most likely print locally for Alaska, Hawaii and C anada.</p>
<p>7 Describe any unique distribution and/or delivery methods 4 or options offered in your proposal.</p>	<p>Notapplicabletoourservices.</p>
<p>7 Specifically describe any self- 5 audit processor program that you planto employ to verify c ompliance with your proposed agreement with Sourcewel l. This process includes ensuring that Sourcewell particip ating entities obtain the proper pricing.</p>	<p>Wewillimplementa four- step processto audit our invoicing of Sourcewell clients. Please note, the process for Sourcewell MN clients will remain independent of this in rega rdsto a previous waiver.</p> <ol style="list-style-type: none"> <li>1. Sourcewell clients will be tagged within our Cu stomer Relationship Management (CRM) tool a nd tracked throughout the sales process.</li> <li>2. Within our master client tracking document, th ere will be a dedicated Sourcewell tab. Sourcew ell clients will be listed with their requirements as o utlined in the Sourcewell contract.</li> <li>3. Monthly reports from Quickbooks (accountin g software) will be pulled for each Sourcewell cli ent. This will provide us fees charge and total mo nthly revenue. This information will be crossed c</li> </ol>

	<p>heckedwiththemasterclienttrackingsheet.                  4. Eachquarter, wewillcrossreferencetheseprocessesandprovideSourcewellamasterreportperthedescriptionintheSourcewellcontract.</p>
<p>7 Ifyouareawardedanagreement,provideafewexamples                  6 ofinternalmetricsthatwillbetrackedtomeasurewhetheryouarehaving                  successwiththeagreement.</p>	<p>HealthSourcemeasuresclientsuccessthroughgoalattainment, employeeengagement, and client/participantsatisfaction, usingaValueonInvestment(VOI)approachthatcapturesbothperformanceoutcomesandculturalimpact.</p> <p>1. GoalAttainment</p> <ul style="list-style-type: none"> <li>• Annualgoalsandmetricsareestablishedandmeasuredbasedonprogressandachievement.</li> <li>• Engagementgoalsaresetatlaunchandreviewedquarterly, withreal-timeadjustmentstoimproveoutcomes.</li> <li>• Annually, apriorityobjectiveissetbasedonorganizationalinitiatives(e.g., preventivecare, mentalhealth, safety, etc).</li> </ul> <p>2. EmployeeEngagement</p> <ul style="list-style-type: none"> <li>• Engagementistrackedthroughparticipation, platformactivity, andprograminvolvement.</li> <li>• HealthSourceaimstoincreasebaselineengagementannuallyasaleadingindicatorofprogrameffectivenessandculturaladoption.</li> </ul> <p>3. SatisfactionandExperience</p> <ul style="list-style-type: none"> <li>• Structuredcheck-insat60daysandmid-year, plusquarterlytouchpoints, ensureongoingalignmentandissueresolution.</li> <li>• Annualsatisfactionssurveysinformcontinuousimprovementandyear-endreporting.</li> </ul> <p>ThisVOI-basedapproachensuresprogramsdelivermeasurableoutcomes, improvedemployeeexperience, andsustainablecultureshifts, contributingtolong-termorganizationalperformanceandcostcontainment.</p>
<p>7 ProvideaproposedAdministrationFee payabletoSourcewell. TheFeeisinconsiderationforthesupportandservice                  7 providedbySourcewell. TheproposedAdministrativeFee                  willbepayabletoSourcewellonallcompletedtransactionstoParticipatingEntitiesutilizingthisAgreement. The                  AdministrativeFee willbecalculatedasastatedpercentage,                  orflatfeesasmaybeapplicable, ofallcompletedtransactionsutilizingthisMasterAgreementwithinthepreceding                  ReportingPerioddefinedintheagreement.</p>	<p>ForportalrevenueandWellnessProgramManagementserviceswewillpaySourcewella2% administrativefeeontotalsales.</p> <p>For screeningservicesandonsitestaffing, wewillprovidea1% administrativefeeforallservices.</p>

**Table 6B: Pricing Offered**

#	The Pricing Offered in this Proposal is: *	Comments
7 8	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	The pricing provided and applied discount are better than retail and specific to the Source well contract.

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

#	Question	Response *
7 9	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	<p>HealthSource Solutions offer the Sixcore solution to meet a variety of market segments and organizational needs.</p> <p>1) Wellness Program Management (WPM): Fractional Support                      Wellness Program Management (WPM) redefines traditional wellness support by operating as a fractional consulting model. This unique approach offers expertise, program direction, ongoing advisory support, and hands-on implementation assistance. Delivered remotely, this service acts as an extension of your internal team, providing consistent, behind-the-scenes support to design, execute, and sustain a comprehensive well-being strategy.</p> <p>Rather than simply managing a wellness platform, WPM provides both strategic leadership and operational execution. This shifts wellness from a series of disconnected activities into a cohesive, goal-driven program that becomes part of the organizational culture.</p> <p>The WPM model is designed to achieve deeper organizational impact by focusing on key factors that drive engagement, sustainability and impact. It emphasizes organization alignment, leadership presence, management support, infrastructure development (i.e. champion networks, branding), creating a supportive environment, and establish in cross-functional networks to support long-term program success.</p> <p>WPM services are well-suited for organizations that:</p> <ul style="list-style-type: none"> <li>• Haven't previously implemented a wellness program and need a structured framework, annual plan, implementation support, and accountability to execute the annual plan</li> <li>• Struggle with program continuity, engaging hard-to-reach populations, or seeking stronger metrics and accountability to reach program goals</li> <li>• Are ready to advance program depth, foster a culture that integrates wellness into daily operations, and demonstrates program impact</li> </ul> <p>The WPM service can be offered standalone or combined with our Health Portal.</p> <p>2) Health Portal + Wellness Program Management                      Our employee wellness and health portal is a robust and highly customizable technology that we design to match your organization's wellness program goals and needs. Our team puts well-being into action with engaging individual and peer activities, courses, and</p>

challenges. The gamification, competitions, and incentive tracking components encourage accountability at work and home.

The portal is easy to use on the web or app platform across all devices. Tracking is easy with the option to sync with popular wearable devices. The extensive communication features include text message nudges, pop-up banners, notifications, and more to increase program awareness.

Combining our Health Portal with Wellness Program Management expands a wellness program from being individually focused to an organizational priority.

The portal can be purchased separately or combined with our Wellness Program Management packages.

The Base Portal Package includes:

- Support Team: Dedicated Account Specialist, end user helpline, and support email to ensure timely assistance and issue resolution
- Full Platform Access to all portal features and functionalities
- Customized Implementation: Portal configuration includes URL, branding, links, eligibility file feed, SSO inbound, registration, and reporting fields
- Program Design: Guidance on best practice wellness programming, access to a library of over 400 predefined challenges, Health Risk Assessment (HRA), and the ability to customize activities aligned with organizational goals
- Site Administration: Ongoing user list management, site maintenance, and troubleshooting
- Communications: Program launch materials, product guides, predefined announcements and campaigns, and personalized program updates per program year via email or text message
- Ongoing Support: Administrator training and assistance, quarterly check-in meetings, and regular updates on program usage and engagement
- Built-in Rewards Mall for e-gift card incentive redemptions
- Dependents are included at no additional cost
- Reporting: Quarterly, mid-year and year-end reports; aggregate Health Risk Assessment (HRA) and biometrics screenings summaries where applicable; participant feedback survey results; and incentive tracking

Package Definitions:

All packages include Base portal services with an option to add Wellness Program Management support. Clients that combine the portal with Wellness Program Management experience up to 20% higher engagement in the portal and programs.

- BASE package: portal
- ENHANCED package: portal + 54 hours/year of fractional wellness support
- PREMIUM package: portal + 100 hours/year of fractional wellness support
- ELITE package: portal + 200 hours/year of fractional wellness support

Service hours are determined based on organizational size, number of locations, program goals, desired outcomes, and level of support desired. Health Source Solutions recommends an initial consultation to assess needs and determine the appropriate level of service prior to finalizing a service package.

3) Onsite Staffing: Health Promotion, Program Management, and Health Coaching  
Placement of onsite wellness professionals provides high-touch, in-

personsupportthatfosterstrust,enhancesorganizationalintegration,andcreatesmeaningfulhumanconnectionbeyondwhatechnologyalonecanachieve.

HealthSourcehiresqualifiedprofessionalsbasedontheuniqueneedsofeachparticipatingorganization.Ourteambringsexpertiseinhealthpromotion,publichealth,exercisescience/physiology,kinesiology,andhealthcoaching,withadditionaldisciplinesavailableasneeded.Additionaldisciplinesmaybeprovideduponrequest.

Wecurrentlyprovideonsitestaffingrangingfrom0.6FTEto1.0FTEacross10statesandareequippedtosupportorganizationsnationwide.

#### PrimaryScopeofServices

- BuildandSupporttheInfrastructure:Developastrategicannualwellnessplan,ensureaccountabilityforannualgoalsandkeyperformanceindicators,managevendorrelationships, collaboratewithleadershipteamsandvariousworklocationstoaddressconcerns.
- CommunicationStrategyandExecution:Partnerwithinternalliaisonstocreateandimplementcommunicationplansthatpromotewellnessprogramsandleverage resources.Utilizeexistingchannelsanddevelopengagingmaterials(flyers,videos,internalsites)focusingonhard-to-reachemployees.Equipmanagersandsupervisorswithinformationandtrainingtoactivelysupportandpromotewellbeing.
- CultureofHealth:Fostertrustandengagementbyembeddingwellbeingintothefabricoftheorganization–“thisisthewaywedothingshere”.Ensureprogramsareaccessible,visible,andrelevanttoallemmployees.Withstaffintegratedintodailyoperations,theirc onsistentpresenceenablesreal-timeinsight,earlyidentificationofneeds,andthedevelopmentofauthentic,trust-basedrelationships.
- WellnessCommitteesandChampionNetworks:Establishandleadcross-functionalwellnesscommitteeswhichincluderepresentativesfromkeyorganization alareas.Facilitateregularcommitteemeetingsandmaintainmomentum,engagement, andaccountability.
- ProgramImplementationandIntegration:Executeandsupportongoingwellnessinitiativeswhilemaximizingexistingbenefitsandcollaboratingacrossdepartments(HR,safety,benefits,ERGs).Programmingmayincludebehaviorchangeinitiatives,educati onalsessions,healthfairs,newhireonboardingsupport,andincreasedutilizationofpa rtnerresources.
- Measurement,Evaluation&Reporting:Overseedatacollectionandreporting,provid ingregularupdatestoleadership.Leverageinsightstomakereal-timeadjustmentsandcontinuouslyimproveprogrameffectiveness.Shareoutcomes, testimonials,andstrategicrecommendationstodemonstratevalueandguideongoingrefinement.
- HealthCoaching(Optional):Provideindividualorgroupcoachingonhealthandwellnesst opicsandassistwithgoalsettingandaccountability.Serveasatrustedhealtheducati onresourceandfacilitatereferralstoadditionalemployeeeresourcesasneeded(saf ety,EAP,etc.).Enhanceoverallawarenessandengagementinthewellnessprogram.

4) Onsite Staffing: Fitness Center Management

HealthSource brings extensive experience in fitness center management and integrated wellness programming across federal, municipal, and large employer environments. Our approach combines consistent onsite staffing, strong operational oversight, group fitness programming, and personalized coaching to drive engagement and results.

We provide onsite fitness professionals with the proper education, certifications, and experience to align to each organization's needs. Core backgrounds include exercise science/physiology, kinesiology, and human performance, along with nationally recognized fitness certifications. All staff are CPR/AED certified. Additional specialties and certifications are available based on request.

Having dedicated onsite presence in the fitness centers enhances participation, supports safe and effective facility use, increases accountability, enables personalized coaching and behavior change, and brings a center to life!

Core Services Include:

- Facility Operations: General cleanliness, scheduling regular equipment maintenance, facility repair requests, and safety/risk management.
- Membership Management: Drive participation through member recruitment, onboarding, access management, orientations, as well as ongoing retention programs.
- 1:1 Member Consultations: Members receive unlimited individualized support aligned with their goals, including fitness assessments, personal exercise plans, wellbeing check-ins, and equipment/exercise guidance.
- Group Fitness Services: Classes are included in the annual staffing price and designed to accommodate all fitness levels. Offerings are driven by member interest, with typically 5–10 classes per week per staff member. Formats may include strength training, yoga, cycling, HIIT, bootcamp, and core conditioning, depending on available space and equipment.
- Annual Programming Plan: Collaborate with organization to create a yearly plan based on goals and metrics. This roadmap helps our staff execute the details for promoting participation and membership retention.
- Metrics and Reporting: Monthly, quarterly, and annual reports could include membership changes, fitness center utilization, program participation, testimonials, and year-over-year trend data.
- Communications and Engagement: Our team delivers content across all dimensions of wellbeing to support sustained behavior change including physical, mental, social, financial, and community. Communication methods include newsletters, flyers, videos, and live presentations or webinars. We maximize reach by leveraging multiple channels such as email, intranet sites, digital boards, bulletin boards, calendar invites, and all-staff meetings.
- Organizational Integration & Outreach: Our staff extend impact beyond the fitness center by integrating and collaborating with broader organizational initiatives often aligned with safety, benefits and ERG's. They also support the coordination and delivery of

ntssuchashealthfairs,educationalsessions,stretchbreaks,teamchallenges,andbiometricscreenings

•HealthSourceSolutionsInternalFitnessTeamResources:AllHealthSourceFitnessCenterteammembersacrossthecountrycollaborateregularlytodevelopnewprograms,educationalcontent,membershipinitiatives,andfitnesschoreography.Thesesharedresourcesdriveefficiency,keepofferingsfreshandrelevant,andallowstafftospendmoretimeengagingdirectlywiththeirmembers.

#### 5)OnsiteBiometricScreeningServices

With25plusyearsofbiometricscreeningexperience,weknowwhatittakestodeliveranengagingandsuccessfulonsitescreeningevent.HealthSourceSolutionsisregistereditoconductcholesteroltestingundertheClinicalLaboratoryImprovementAmendments(CLIA).WeutilizeCardioChektechnology,whichisCLIA-waivedforitsdemonstratedvalidityandreliability.

Wepreferfingersticksscreeningwhichallowsparticipantstoreceiveandreviewresultsinrealtime.Thisimmediatefeedbackcreatesavaluable“teachablemoment,”enablingourstafftoprovidepersonalizedguidance,answerquestions,andconnectresultstomeaningfulnextsteps.

Biometrictestingincludesfastingornon-fastingresultsforTotalCholesterol,HDL,LDL,Triglycerides,Glucose,BloodPressure,Height,Weight,andBMI.Foranadditionalcost,wecanofferA1CandCotinine screenings.

Akeydifferentiatorofourbiometricscreeningapproachisourfullypaperlesssystem,designedtostreamlinedatacollectionandenhancetheparticipantexperience.Eliminatingmanualpaperworkreduceserrors,improvesefficiency,andensuresthese secure handlingofsensitivehealthinformation.Inaddition,participantscanreviewtheirresultsyearoveryear,offeringvaluableinsightintopersonalhealthtrends.Thishistoricaldataempowersindividualstotrackprogress,identifyopportunitiesforimprovement,andmakeinformeddecisions—reinforcingourcommitmenttolong-termhealthoutcomes.

Ourteamhandlesthecoordinationoftheeventandprovidesmarketingandcommunicationsupport.Ourprimaryfocusiscreatingapositiveexperiencesothatparticipantsfelevalued,informed,andunderstandnextstepstoimprovetheirhealth.

#### 6.)CollaborativeSolution

Thispackageisspecificallydesignedforgovernment-sponsoredhealthinsuranceplansandriskpools.

HealthSourceSolutionsoffersacohort-basedmodelthatcombinesaccesshealthportalforallplanmembersandincludesfractionalWellnessProgramManagement(WPM)servicesattheParticipantEntitylevel.Thisstructureenablesparticipatingorganizationstobuildorstrengthentheirwellbeingstrategieswithexpertguidance,whileleveragingsharedresourcesandeconomiesofscaleacrosstheplan.

Wecloselycollaboratewiththesponsoringagencytodefinescope,timelines,andperformanceexpectations.Byintegratingpreventionandwellbeingstrategiesatboththeorganizationalandindividuallevels,thismodelsupportscostcontainment,improvedpo

	<p>pulation health outcomes, and alignment with plan-level performance objectives. Services are customizable to align with specific plan objectives, population needs, and contractual requirements, in accordance with the terms of the SourceWell Master Agreement.</p> <p><b>Compliance and Data Privacy</b> All services are delivered in accordance with applicable federal and state regulations, including but not limited to HIPAA and data privacy requirements. Health Source Solutions will maintain appropriate safeguards to ensure the confidentiality and security of participant information.</p>
<p>8 Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>Health Source Solution offers several supporting subcategory services. These often integrate with our larger Wellness Program Management, Health Portal Packages, and Onsite staffing services.</p> <p><b>Virtual Health Coaching</b> In addition to our onsite health coaching service, we can also offer virtual health coaching through our partner, Marquee Health. Using motivational interviewing and habit loop awareness, coaches guide individuals through the readiness to change continuum toward sustainable progress. They offer innovative programs that educate and empower participants to make lasting lifestyle changes. This service can be offered as participant initiated or health coach initiated (with or without incentive). Options to include dependents are available.</p> <p><b>Behavioral Health</b> Animo is a digital behavioral health platform rooted in Cognitive Behavioral Therapy (CBT). It is designed to improve access to quality mental health care and reduce stigma. Accessible via web and mobile, it begins with an Emotional Fitness Survey based on the DASS-21, then recommends computerized CBT (cCBT) modules focused on life skills and coping strategies for depression, anxiety, and stress.</p> <p><b>TextCoach™</b> is a message-based mental health coaching tool available anytime, on any device, designed to bridge gaps in access and care. By reducing stigma and offering flexible support, coaches provide personalized care plans using assessments, tip sheets, assignments, videos, and guided exercises. TextCoach™ features:</p> <ul style="list-style-type: none"> <li>• 100% Confidential</li> <li>• Stigma-Free and Easy-to-Use</li> <li>• Accessible via Mobile or Desktop</li> <li>• Texting available 24/7</li> <li>• Independently licensed mental health clinicians</li> <li>• Exchange Text-Based Messages, as well as Voice notes, Tip Sheets, Videos, and Articles</li> </ul> <p><b>EAP Services</b> EAP Services + Animo + TextCoach: Includes an affordable option for mental health support through the digital behavioral health platform, message-based mental health coaching, and virtual EAP therapy sessions.</p> <p><b>Wellbeats</b> Wellbeats is an affordable, scalable, accessible on-demand fitness benefit that supports physical and mental well-being through habit-</p>

	<p>building. In partnership with HealthSource Solutions, employees can access 700+ classes across 31 channels—anytime, anywhere. With goal-based workout plans, fitness assessments, and content ranging from yoga and cycling to nutrition and office breaks, Wellbeats makes wellness easy to engage with on their terms.</p> <ul style="list-style-type: none"> <li>• 700+ high-quality, 1-to-60-minute videos</li> <li>• Relatable, highly certified instructors</li> <li>• 31 channels, no equipment options, for every age, interest, and ability</li> <li>• Goal-based challenges and fitness assessments</li> <li>• Great for multiple locations and remote workers</li> </ul>
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### 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.

#	Category or Type	Offered *	Comments
8 1	Category 1: Wellness engagement programs and platforms	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes. Various on-site and virtual options.
8 2	Category 1: Biometrics screening services and coordination	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes
8 3	Category 1: Wellness incentivemangement	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes. Several options for managing different types of incentives through on-site and virtual wellness management services.
8 4	Category 1: Health coaching	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes. In-person and virtual options.
8 5	Category 1: Wellness program management and related services, such as data analytics, predictive modeling, wellness program branding, strategic planning, and on-site wellness center management, but only to the extent that such services are complementary to a proposer's offering of the solutions described in 73-76 above.	<input checked="" type="radio"/> Yes <input type="radio"/> No	Yes. Various strategic options for on-site and virtual wellness program support.
8 6	Category 2: Open Enrollment Support	<input type="radio"/> Yes <input type="radio"/> No	N/A
8	Category 2: Health Plan decisions support including but not limited to virtual		N/A

7 alplancomparisontools	Yes No	<input checked="" type="radio"/>
8 Category2:EnrollmentTechnologyforhealthplansandotherbenefite 8 nrollment	Yes No	N/A
8 Category2:OpenEnrollmentSupportandrelatedservices,butonlytot 9 heextentthatsuchservicesarecomplementarytotheproposer'sofferi ngofthesolutionsdescribedin78-80above.	Yes No	N/A <input checked="" type="radio"/>

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

**Line Item 90. NOTICE:** To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Master Agreement Template provided in the “Bid Documents” section. Proposer must upload the redline in the “Requested Exceptions” upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Master Agreement.

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

**Documents**

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

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1)

document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."

- [Pricing](#) - Pricing - HealthSource Solutions Pricing 2026.pdf - Friday April 03, 2026 13:50:01
- [Financial Strength and Stability](#) - 13. Financial Strength - Bank Reference Letter 04.01.2026.pdf - Friday April 03, 2026 13:50:13
- [Marketing Plan/Samples](#) - 37. Marketing Samples - HealthSource Solutions.zip - Friday April 03, 2026 13:50:26
- [WMBE/MBE/SBE or Related Certificates](#) - 51. WBE.SBE.WOSB Certifications - HealthSource Solutions.zip - Friday April 03, 2026 13:50:41
- [Standard Transaction Document Samples](#) - 62. Standard Transaction Doc - Sample Statement of Work (Portal+WPM).pdf - Friday April 03, 2026 13:50:52
- Requested Exceptions (optional)
- [Upload Additional Document](#) - 47. Case Studies - HealthSource Solutions.zip - Friday April 03, 2026 13:51:03

## 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. - Mary Kruse, Chief Executive Officer/Owner, HealthSource Solutions, LLC

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

Yes

No

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
<b>Addendum 4 040226 Wellness Program Engagement, Open Enrollment Support and Related Services</b> Mon April 6 2026 08:22 AM	<input checked="" type="checkbox"/>	1
<b>Addendum 3 040226 Wellness Program Engagement, Open Enrollment Support and Related Services</b> Fri March 6 2026 01:11 PM	<input checked="" type="checkbox"/>	2
<b>Addendum 2 040226 Wellness Program Engagement, Open Enrollment Support and Related Services</b> Tue February 24 2026 07:07 AM	<input checked="" type="checkbox"/>	2
<b>Addendum 1 040226 Wellness Program Engagement, Open Enrollment Support and Related Services</b> Thu February 19 2026 02:22 PM	<input checked="" type="checkbox"/>	1