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MASTER AGREEMENT # 040226
CATEGORY: Wellness Program Engagement, Open Enrollment Support and Related Services
SUPPLIER: LifeWorks (US) Ltd. dba TELUS Health

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, Staples, MN 56479 (Sourcewell) and LifeWorks (US) Ltd. dba TELUS Health, 250 Royall Street, Suite 210W, Canton, MA 02021 (Supplier).

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

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

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

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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.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.

   b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.

6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.

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 Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.

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

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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. If applicable, 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

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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

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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.

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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

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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;

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- 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

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

9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. In the event of failure to remit payment, delinquent payments, underpayments, or other deviations from the payment requirements of this Agreement, Sourcewell shall provide written notice to the Supplier specifying the nature of the payment deficiency. The Supplier shall have forty-five (45) days from receipt of such notice to remedy the payment deficiency and bring the account current. Failure to cure the payment deficiency within the forty-five (45) day remedy period may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.

11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.

12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Notwithstanding the foregoing, Supplier may assign (including an assignment by operation of law), transfer or delegate any of its rights or obligations to any of its affiliates or any successor in interest to all or substantially all of the assets or business of any Supplier line of business, without Sourcewell's consent but upon written notice to Sourcewell, in which case, such affiliate or successor in interest shall be bound by and entitled to the benefit of the terms, conditions and obligations of this Agreement. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.

13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.

14) **Waiver.** Failure by a Party to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.

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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 and Limitation of Liability.** (i) Subject to subsection 17(a) below**,** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any third-party claims or causes of action, including reasonable attorneys' fees incurred by Sourcewell, arising out of any negligent act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

    a) Supplier's total aggregate cumulative liability (including liability of Supplier's affiliates and subcontractors) to Sourcewell and its affiliates (collectively, "Aggrieved Parties"), for all claims, demands, actions, causes of action, lawsuits, judgments, damages, costs, expenses, or losses of any kind (collectively, "Claims") arising out of or relating to this Agreement—whether based on contract, statute, tort (including negligence), or any other legal theory—shall be limited to the Aggrieved Parties' actual, direct damages and shall not exceed $250,000 USD in the aggregate for all Claims, except as provided below.

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

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

    For the purposes of carve-out #2 above, gross negligence means any act or failure to act by any person that was in reckless disregard of the harmful consequences such person knew, or should have known, such act or failure to act would have on individuals or property, but does not include any act or failure to act that constitutes mere ordinary negligence.

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

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

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

   b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party, upon written consent from the other party, to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

   c) **Use; Quality Control.**
      i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

      ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

   d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

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

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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, or the equivalent, with coverage and limits of insurance not less than the following:

a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis and insuring against claims for bodily injury, including death, and property damage, including loss of use, and personal injury including advertising liability, arising out of Supplier's operations under this Agreement. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
   - $1,500,000 each occurrence Bodily Injury and Property Damage
   - $1,500,000 Personal and Advertising Injury
   - $2,000,000 aggregate for products liability-completed operations
   - $2,000,000 general aggregate

b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. 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 include Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier. Where permissible by law, the commercial general liability insurers will provide primary coverage to Sourcewell in respect of liability arising out of Supplier's operations under this Agreement and will not seek contribution from other insurance available.

d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) 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

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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.

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4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

5) **Transaction Documents.** Participating Entity and/or Supplier may require the use of their own respective forms to complete transactions directly between such parties utilizing the terms established in this Agreement. Supplier's standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.

6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.

7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.

8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell	LifeWorks (US) Ltd. dba TELUS Health
Signed by: Jeremy Schwartz C0FD2A139D06489...	Signed by: 31C648D86682406...
By: _____	By: _____
Jeremy Schwartz	Brad Fusco
Title: Chief Procurement Officer	Title: Vice President, Retirement and Benefits Solution
Date: 8/10/2026 | 1:26 PM CDT	Date: 8/10/2026 | 1:13 PM CDT

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

Vendor Details

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

Submission Details

Created On:	Wednesday April 01, 2026 09:31:21
Submitted On:	Tuesday April 07, 2026 13:03:36
Submitted By:	Colleen Hunter
Email:	colleen.hunter@telushealth.com
Transaction #:	80906d5c-417f-4ad0-a3ff-11f1034c28d7
Submitter's IP Address:	10.13.1.20

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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	ProvidethelegalnameoftheProposerauthorizedtosubmitthisProposal.	TELUSHealth(U.S.)Ltd.
2	Intheeventofaward,isthisentitytheResponsibleSupplierthatwillexecutethemasteragreementwithSourcewell?YorN.	Y
3	Identifyallsubsidiaries,D.B.A.,authorizedaffiliates,andanyotherentitythatwillberesponsibleforofferinganddperformingdeliveryofSolutionswithinthisProposal(i.e.ResponsibleSupplier(s)thatwillexecuteamasteragreementwithSourcewell).	TELUSHealth(U.S.)Ltd.willbethelegalentityresponsibleforofferinganddeliveringtheSolutionsandexecutingthemasteragreementwithSourcewell. WorkplaceOptions(WPO),awholly-ownedsubsidiaryofTELUSHealth,willserveasaResponsibleSupplierforthedeliveryofwellnessprogramengagementandopenenrollmentsupportservicesunderthemasteragreement.
4	ProvideyourCAGEcodeorUniqueEntityIdentifier(SAM):	CAGE:7KXU7;UEI:YW8VC98K22K3
5	ProvideyourNAICScodeapplicabletoSolutionsproposed.	541612;624190
6	ProposerPhysicalAddress:	250RoyallStreet,Suite210W,Canton,MA02021

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7	Proposerwebsiteaddress(oraddresses):	www.telushealth.com *
8	Proposer'sAuthorizedRepresentative(name,title,address,emailaddress&phone)(Therepresentativemusthaveauthoritytosignthe“Proposer’sAssuranceofCompliance”onbehalfoftheProposer):	BradFusco-VicePresident,RetirementandBenefitsSolutions;250RoyallStreet,Suite210W,Canton,MA02021;bradley.fusco@telushealth.com;(412)919-4816 *
9	Proposer'sprimarycontactforthisproposal(name,title,address,emailaddress&phone):	LanceBradley-AccountExecutive,RetirementandBenefitsSolutions;250RoyallStreet,Suite210W,Canton,MA02021;lance.bradley@telushealth.com;(919)602-5220 *
10	Proposer'sothercontactsforthisproposal,ifany(name,title,address,emailaddress&phone):	DevonRamella-AccountExecutive,EmployerSolutions;250RoyallStreet,Suite210W,Canton,MA02021;devon.ramella@telushealth.com;(610)349-4024 KevinKanoon-ClientRelationshipLeader;250RoyallStreet,Suite210W,Canton,MA02021;kevin.kanoon@telushealth.com;(412)350-8227 * ColleenHunter-AccountExecutive,EmployerSolutions;250RoyallStreet,Suite210W,Canton,MA02021;kevin.kanoon@telushealth.com;(716)406-7866

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

#	Question	Response *
11	Provideabriefhistoryofyourcompany,includingyourcompany’scorevalues,businessphilosophy,andindustrylongevityrelatedtotherequestedSolutions.	TELUSHealthhasbeenprovidingservicesacrossNorthAmericafornearly60yearscoveringover161,000,000livesacrosstheglobethroughourservices.Weareaglobalhealthandwellbeingleaderencompassingphysical,mentalandfinancialhealthdeliveringanintegratedapproachtowellbeingthroughoursolutionsandservices.Weaimtobethemosttrustedwellbeingcompanyintheworldbybuildingthehealthiestcommunitiesandworkplacesontheplanet. TELUSHealthadoptsaholisticapproachtowellbeing,encompassingphysical,mental,andfinancialhealthservices.Thecompanyiscommittedtobuildingthehealthiestcommunitiesbyempoweringorganizationstoaddresshealthchallengesbeforetheyescalate.ThroughdigitalinnovationandAI-poweredsolutions,TELUSHealthisredefiningemployeewell-beingintheworkplaceofferingpreventivehealthprograms. * Ourbusinessisbuiltuponapowerfulprinciple:Happy,healthyandempoweredpeoplearetheheartofhigh-performingorganizations.TELUSHealthimprovesthefinancialhealthandwellbeingoforganizationsandindividualswithsustainableandflexibleretirem

		entandbenefitssolutions.Justaswithphysicalandmentalhealth,webelievethatfinancialhealthandsecurityisakeycomponenttooverallhealth.Ourrenewedstrategyputsallofourpartnersandcustomersatthecenterofeverythingwedobyfocusingonthetopmarketsegmentsforhealthandwellbeingservices,retirement,benefitsandadministrationproductsandservices,andhealthcaretechnologysolutions.Byimprovingaperson'slifeandwellbeing—theywillbehappier,healthierandultimatelymoreengagedandproductiveatwork.Ourapproachspansservicesinbenefitsadministration,retirementandfinancialsolutions,billingmanagement,leavemanagement,employeeandfamilyassistance,andrewards,recognitionandperkswithahighlyflexibletechnologyplatformthatimprovesourclients'performance. OurproprietarysystemsforHealth&Welfarebenefitsadministration,retirement/pensionandfinancialsolutions,billingmanagement,COBRA,directbillingleavemanagement,employeeandfamilyassistance,studentsupportservices,andrewards,totalmentalhealth,traumasupport,rewards,recognitionandperkswithahighlyflexibletechnologyplatformthatishighlyconfigurable,modularandflexiblesystemdesignedtoefficientlyimplementandexecuteclient-specificprovisionsandprocesses.Itisrules-based,effective-datedandevent-drivenwithanintegratedworkflowthatsignificantlyreducesroutineprocessing. TELUSHealthhasestablisheditselfasanindustryleaderincorporatehealthandemployeewellnesssolutions.ThecompanypublishestheTELUSMentalHealthIndex,deliveringquarterlyinsightsacrossmultipleregionsglobally.Maintainingthehigheststandardsofethicalconductthroughits CodeofEthicsandConduct,TELUSHealthcontinuestodemonstrateitscommitmenttoexcellenceandinnovationinhealthcaredelivery.
12	Whatareyourcompany'sexpectationsintheeventofanaward?	Ifawardedthecontract,TELUSHealthwillbethrilledtocontinueourtrustedpartnershipwithSourcewellanditspartners.Weviewourclientrelationshipsastruepartnerships.Ourapproachensuresthatourresourcesareyourresources,providingregularaccesstoourtopthinkersandsubjectmatterexpertsacrossareasofourserviceofferings.Weofferaccesstobestpractices,trends,anddatasets,andcollaboratecloselywithyourteamtotrackbothmacroandmicrohealthcaretrends.Ourcommitmentistodeliveracomprehensive,client-focusedsolution,leveragingourexpertiseandresourcestosupportyourorganizationalgoals.
13	Demonstrateyourfinancialstrengthandstabilitywithmeaningfuldata.Thiscouldincludesuchitemsasfinancialstatements,SECfilings,creditandbondratings,lettersofcredit,anddetailedreferenceletters.Uploadsupportingdocuments(asapplicable)inthedocumentuploadsectionofyourresponse.DONOTPROVIDEANYTAXINFORMATIONORPERSONALLYIDENTIFIABLEINFORMATI	TELUSHealthhasretainedprofitsineveryyearsinceitsinception.TELUSHealthhasbeeninbusinessforover56years(includingtheLifeWorkslegacy),andourparentcompany'spublicstatusandglobaloperationsfurtherdemonstrateourfinancialstabilityandlong-termcommitmenttothemarket.Ourcorporateclientsoftencitethisstabilityasoneoftheprimaryfactorsintheirdecisiontohaveusdeliverservicesofsuchhighimportancetotheiremployeesandfamilymembers. TELUSHealthisaglobalhealthcareleaderwithmorethan11,304employeesandcollaborationwithover60,000+clientorganizationsworldwide,wearecommittedtodeliveringemployeewellbeing,benefitsadministration,retirement,andwellnessproductsandserviceswithanunmatchedlevelofcustomerserviceexcellence..FormoreinformationpleaserefertoTELUSCorporation'sConsolidatedFinancialStatementsandAnnualReport,whichareavailable

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	ON.	atwww.telus.com,SEDAR,orEDGAR.
14	WhatisyourUSmarketshareforthe Solutionsthatyouareproposing?	TELUSHealthisasignificantplayerintheUSmarket,offeringcomprehensiveHealth,Retirement,Wellbeing,EAP,StudentSupport,andTotalMentalHealthservices.TELUSHealthservesapproximately500publicsectorandhighereducationclientsinNorthAmerica,includingfederal,state,andlocalgovernmentorganizations,aswellascolleges,schoolboards,andrelatedstudentandeducatorassociations.Ourmarketpresencerepresentssignificantpenetrationintheeducationandpublicsectorsegments,withdemonstratedexpertiseinmanagingcomplex,multi-locationimplementations. *
15	WhatisyourCanadianmarketshareforthe Solutionsthatyouareproposing?	AsaCanadiancompany,strongpresenceinCanadianmarketwithservicecentersinTorontoandMontreal,supportingmajoremployersandinstitutionalclients. *
16	Discloseallcurrentandcompletedbankruptcyproceedingsfor Proposerandanyincludedpossible Responsible Partywithinthepastseveny ears.Proposermustprovidenoticeinwritingto Sourcewe llifitentersabankruptcyproceedingatanytimeduringthependencyofthisRFPevaluation.	N/A TELUSHealthisafinanciallystableorganization. *
17	Howisyourorganizationbestdescribed:isitamanufacturer,adistributor/dealer/reseller,oraserviceprovider?Answerthequestionthatbestappliestoyourorganization,eithera)orb). a)Ifyourcompanyisbestdescribedasadistributor/dealer/reseller(orsimilarentity),provideyourwrittenauthorizationtoactasadistributor/dealer/resellerforthemanufacturerofthe productsproposedinthisRFP.Ifapplicable,isyourdealernetworkindependentorcompanyowned? b)Ifyourcompanyisbestdescribedasamanufacturerorserviceprovider,describeyourrelationshipwithyoursalesandserviceforceandwithyourdealernetworkindeliveringtheproductsandservices proposedinthisRFP.Arethese individualsyouremployees,ortheemployeesofathirdparty?	TELUSHealthistheserviceprovideroftheproposedsolutions. *

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18	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	TELUS Health obtains a SOC 2 Type II, and its security program aligns with ISO standards and NIST. TELUS Health certifies that, as of the last day of the preceding calendar year (the "Reporting Date"), it possessed all qualifications and registrations required by applicable law to perform its obligations under the Agreement and maintained such qualifications and registrations during the immediately preceding 12-month period. *
19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status anytime during the pendency of this RFP evaluation.	N/A *
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	TELUS Health has received numerous industry awards and recognitions in the last five years, including: •2025: TELUS was the world's first ISO privacy certification for our GenAI tool and we've joined the USAI Saety Consortium under the Department of Commerce's National Institutes of Standards and Technology (NIST). Additionally, TELUS Health was recognized as a Top Vendor in Wellness for Q1 2025 by Shortlister. •2024: Included in the Corporate Knights 2024 Global 100 Most Sustainable Corporations in the World; recognized in the Corporate Knights Best 50 Corporate Citizens in Canada; recognized by Mediacorp Canada Inc. as one of Canada's Greenest Employers; recognized by TIME Magazine and Statista in their inaugural list of the World's Most Sustainable Companies, ranking 21st globally and as the most sustainable telecommunications company in Canada. •2022: Awarded the Sustainability Excellence Award at the World Sustainability Awards; recognized at the Global Good Awards as Global Good Company of the Year (bronze); named to the Dow Jones Sustainability North America Index for the 24th consecutive year; recognized as one of Canada's Greenest Employers; recognized by Nelson Hall as an overall leader for next-generation benefits administration; •2022 Microsoft Canada Impact Awards: TELUS Health, formerly LifeWorks, won the ISV Impact Award from the Microsoft Canada Impact Awards. •2021 Awards of Excellence: TELUS Health, formerly LifeWorks won a silver award for its Mental Health Index in the category of Best Use of Media Relations Large Budget. •2021 CPRS Ace Awards: TELUS Health, formerly LifeWorks, won two gold awards for its Mental Health Index in the categories of Best Use of Media Relations-Large Budget and Best Use of Media Relations-COVID-related. •2021 Annual Spring Digital Health Awards: TELUS Health, formerly LifeWorks, won silver for its COVID-19 Toolkit; bronze for its New Normal in the Pandemic Toolkit; bronze for its Buil *

		dingAwarenessofaDiverse,Equitable,andInclusiveWorkplaceeLearning program;andameritawardforitsWellbeingWednesdaysonFacebookLive. •2019:TELUSHealth(formerlyLifeWorks)wasrecognizedbytheCanadian HRReporterReaders'ChoiceAwardsinthecategories:benefitsandpension sconsultants,disabilitymanagementconsultants,EAP(employeeassistan ceprogram)providers,andmentalhealthservicesproviders.
21	Whatpercentageofyoursalesaretothegovernmentalsectorinthepastthreeyears?	Wehavealonghistoryofpartnership,andthedevelopmentanddeliveryofmentalhealthandwellnesssolutionsformanygovernmentinstitutionsintheUnitedStatesandCanada.Ourclientbaseofmorethan500consistsofwell-recognizedgovernmentinstitutions.Wearelicensedtooperateanddelivercounselingservicesinall StatesandUSterritoriesandacrossCanada,ensuringcompliancewithallrelevantFederalandState/Provincialprivacyregulationsandlaws,andmeetingorexceedingallauditedconfidentialityandprivacyrequirementsasestablishedbytheEmployeeAssistanceSocietyofNorthAmerica(EASNA)andtheCouncilonAccreditation(COA).
22	Whatpercentageofyoursalesaretotheeducationsectorinthepastthreeyears?	Wehaveextensiveexperienceworkingwitheducationalinstitutionsacross USandCanada,andglobally.TELUSHealthStudentSupportSolutionsalone supportsover2millionstudents.Additionally,TELUSHealthcurrentlysupportsapproximately500educationalclientsacrossUSandCanadawithhealthandwellbeingsolutions. Wehavealsosupportedtheseclientswithservicessuchasinvestmentpolicy review,investmentstrategydevelopment,assetallocationanalysis,managersearch,performancemonitoring,andasset-liabilitystudies.Ourexperienceincludesmanagingpensionandendowment funds,conductingriskassessments,andprovidingrecommendationstooptimizeinvestmentstructuresforeducationalsectorclients.
23	Listallstate,cooperativepurchasingagreementsthatyouhold.Whatistheannualsalesvolumeforeachoftheseagreementoverthepastthreeyears?	TELUSHealthhasStudentSupportcontractswithseveralstateinstitutionsthathavepiggybackedononeanother'scontracts.Ourspecificcooperativepurchasingagreementsarelimitedtoourcurrent Sourcewell contracts-102821-LWand072225-LW,whichareopentoanymembers,privatenonprofitsorpubliceducationalinstitutions,thathaveaneedforstudentmentalhealthsupportservices.TELUSHealthhasalsocontractedwiththeCommonwealthofMassachusetts,OperationalServicesDivision,howeverthatislimitedtoUS-basedpublicinstitutionsofhighereducationanddoesn'tallowfornonprofitprivateinstitutionsasSourcewelldoes.Salesvolumeforeachoftheseagreementshasfluctuatedovertheyearsasnewmembersoptedinandothersoptedout.Inthelast2.5yearsoftheSourcewellagreement,4contractshaveutilizedSourcewell,includingonestatesystemwith12colleges,2additionaluniversities,andoneschoolsystem.FiveMA-basedinstitutionsutilizedtheCommonwealthofMassachusettscontractforTELUSHealthservices.
24	ListanyGSAcontractsorStandingOffersandSupplyArrangements(SOSA)thatyouhold.Whatistheannualsalesvolumeforeachofthesecontractsoverthepastthreeyears?	N/A

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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 *	
StateofIllinois-IllinoisDepartmentofCentralManagementServices	KariWolfe-StatewideChiefBenefitsOfficer,BureauofBenefits	Office:(217)524-8979 Cell:(217)299-7604	*
DallasIndependentSchoolDistrict	ValerieRobertson,MPA,SHRM-SCP,CEBS-Director,Benefits,HumanCapitalManagement	(972)925-4048	*
NewMexicoEducationalRetirement Board	KevinSwinson-CIO	(505)602-9114	*

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 *	
26	Salesforce.	TELUSHealthemploysadirectsalesforceworkingdirectlyfortheorganization.TELUSHealthsalesteammembersareempoweredtoworkwithclientstodesignandnegotiatethebestproductandservicesuitepossibletomeettheirneedsandgoals.	*
27	DescribethenetworkofAuthorizedSellerswhowilldeliverSolutions,includingdealers,distributors,resellers,andotherdistributionmethods.	TELUSHealth'SolutionswillbedeliveredbyTELUSHealthemployees.	*
28	Serviceforce.	TELUSHealthemploysover10,000staffwhowilldelivertheservicestoourclients,recruitedfortheirexpertiseintheirrespectivefield.Ouremployeesaretrainedtosupportthediverseneedsofclients,employees,retireesandstudentsthroughmultipledeliverychannels(telephone,chat,video,in-person).Thismakesiteasytosupportallusers whenever and wherever they'relocated.	*
29	Describetheorderingprocess.Iforderswillbehandledbydistributor	SourcewellmembersthatareinterestedinorderingTELUSservicesshouldreachouttoTELUSHealththroughthepointofcontactlistedontheS	*

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	s,dealersorothers,explainthere spectiverolesoftheProposerand others.	ourcewell'sTELUSHealthcontractpage,orthroughyourSourcewellre presentative.You'llbeaskedtoprovidethenameoryourinstitution/org anization,yourleadpointofcontact,howmanymembers(employees,r etirees,students,families)you'llhaveusingtheservice,aswellasafew moreservicepreferencesanddetails.Fromthere,we'llworkoncontract ingtogether.
30	Describeindetailtheprocessand procedureofyourcustomerservi ceprogram,ifapplicable.Include yourresponse-timecapabilitiesandcommitmen ts,aswellasanyincentivesthathe lpyourprovidersmeetyourstated servicegoalsorpromises.	Response-TimeCapabilitiesareflexibledependingonthecontractrequestsandas sociatedterms: ·CallAnswering:Allcallsansweredwithin30seconds(80%-90%target,witha1-10%feesatrisk) ·CounselingAppointments:Non-urgentwithin2businessdays(95%target);urgentwithin1businessday (95%target) ·Work-LifeReferrals:Verifiedreferralswithin2businessdays(95%target) ·CriticalIncidentResponse:Clientcontactwithin30minutes;onsiteres ponsewithin1businessday(95%target) ·CallAbandonment:≤5%forcallslongerthan30seconds ServiceIncentives: ·FeesatRisk:Upto5-20%ongoingfeestiedtoSLAcompliance,demonstratingaccountabilit y,andothernegotiatedservicelevels ·MemberSatisfaction:Target>90%ratingprogramas"Good"to"Excell ent" ·OutcomeTracking:Casesreferredtosessionswithpositiveoutcomes ratingscale(ORS)-85%target TELUSHealthworkstonegotiateservicelevelstandards/requirement sthatalignwithprospectiveclientneedsandrequirements.Theabover epresentasampleofkeymeasurementofsuccessbutcanbenegotiate dbaseduponspecificclientrequirements/needs. ContinuousImprovement:MonthlyKPImonitoring,quarterlyreporting ,andannualstrategicreviews.
31	Describeyourabilityandwillingn esstoprovideyourproductsands ervicestoSourcewellparticipatin gentities.	TELUSHealthwouldbehonoredtocontinueourpartnershipwithSourc ewelltosupportyourparticipatingentities.Wearecommittedtoprovidin gourproductsandservicestoclientswithafocusondeliveringvaluethat extendsbeyondexecution.Ourapproachistoactastrueclientpartner,p rioritizingtheeconomicandoperationaladvantageofourclientsatalltim es.Weofferacomprehensiverangeofhealthandwellnesssolutions,an dareequippedtodelivertheseservicesvirtually,andatclientlocations. TELUSHealthisfullycommittedtoservingallSourcewellparticipatinge ntitieswith: ·ScalableInfrastructure:Provenabilitytosupportorganizationsfroms mallschooldistrictstolargemulti-stateemployers ·FlexibleProgramDesign:Customizablewellnessengagement,open enrollmentsupport,andcomplementaryservices ·IntegrationCapabilities:APIand/orSSOintegration ·Compliance&Security:HITRUSTr2certified,SOC2TypeIIcompliant, ISO27001certified

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		·DedicatedSupport:Accountmanagementandimplementationteams
32	Describeyourabilityandwillingnesstoprovideyourproductsandservicestos ourcewellparticipatingentitiesinCanada.	TELUSHealthisaglobalproviderofvarioushealth,wellbeing,andretirementsolutions.Weareableandwillingtoprovideservicesacrossall Canadianprovincesandterritories. FullCanadianservicedeliverycapability: ·ServiceCenters:TorontoandMontrealwithbilingualsupport(English/French) ·RegulatoryCompliance:AdherencetoPIPEDA,provincialprivacylegislation,andhealthcareregulations ·ProviderNetwork:LicensedprofessionalsmeetingCanadianprovincialrequirements ·CulturalAlignment:UnderstandingofCanadianworkplacedynamics,benefitsstructures,andemployeeneeds
33	IdentifyanygeographicareasoftheunitedstatesorcanadathatyouwillNOTbefullyservingthroughtheproposedagreement.	TELUSHealthwilldeliverservicesinallstates,provincesandterritories acrosstheUSandCanada.Therearenolimitations.
34	IdentifyanyaccounttypeofParticipatingEntitywhichwillnothavefullaccesstoyourSolutionsifawardedanagreement,andthereasoningforthis.	AnyparticipatingentityofSourcewellwillhaveaccesstoourhealth,wellbeing,andretirementsolutionsforclients,employeesandtheirfamiliestotakeadvantageof.
35	Defineanyspecificrequirementsorrestrictionsthatwouldapplytoourparticipatingentitiesin HawaiiandAlaskaandinUSTerritories.	Norestrictionsorspecificrequirements.
36	WillProposerextendtermsofanyawardedmasteragreementtononprofitentities?	Yes,TELUSHealthiswillingtoextendthetermsofanyawardedmasteragreementtononprofitentitiesthatareeligible Sourcewellparticipatingentities,including: •Nonprofiteducationalinstitutions •Nonprofithealthcareorganizations •Nonprofitcommunityandsocialserviceagencies •Nonprofitfoundationsandassociations Pricingandtermswouldalignwiththemasteragreementstructure,withnonprofitstatusverifiedthroughSourcewell'sparticipatingentityeligibilityprocess.

Table 4: Marketing Plan (100 Points)

#	Question	Response *
37	Describeyourmarketingstrategyforpromotingthisopportunity. Uploadrepresentativesamplesofyourmarketingmaterials(ifap	TELUSHealth'smarketingapproachforSourcewellparticipatingentitiesiscustomizedperclientneed,butgeneral,muchofthebelowappliesandincludes: 1.SalesEnablement: ·Salescollateralandone-pagersforquickreference ·CompetitivepositioningmaterialshighlightingGDPdifferentiation ·ROIcalculatorsandcost-benefitanalysistools ·Implementationtimelinesandresourcerequirements

	plicable)inthedocumentuploadsectionofyourresponse.	2.PartnerSupport: ·Co-marketingopportunitieswithSourcewell ·Jointpromotionaleventsandwebinars ·Customizedmarketingmaterialsforparticipatingentities Regularcommunicationonprogramupdatesandenhancements
38	Describeyouruseoftechnologyanddigitaldata(e.g.,socialmedia,metadatausage)toenhancemarketingeffectiveness.	TELUSHealthhasmarketsitselfandourservicespubliclyviapublicwebsiteandsocialsiteslikeLinkedIn.OurprimaryinteractionswithprospectiveclientsandSourcewellmemberstakeplaceinpubliclyallowedchannelsandwhenprospectiveclientscallinorrequestinformationfollow-up. Whenanewclientcomesonboard,havingcontractedTELUSHealthservices,wehavevariousmethodstopromoteservicestotheiremployees,retirees,andfamiliesaccordingly;however,weonlydosobasedonthepreferencesandgoalsoftheclient.Someexamplesareasfollows:digitalcommunications,socialmediaposts,newsletters,pushandnotifications.
39	Inyourview,whatisSourcewell'sroleinpromotingagreementsarisingoutofthisRFP?Howwillyouintegrateasourcewell-awardedagreementintoyoursalesprocess?	Sourcewell'sroleinpromotinganyagreementarisingoutofthisRFPistopubliclyposttheRFPdocuments,awardinformation,contractandpricingfilessothatmemberscanlocateit.Sourcewellrepsshouldchampionthiscontractwhenconnectingwithorganizationsthatexpressaneedforit.Sharingthiscontractatrelevantconferencesishelpfultoo.Likewise,Sourcewell'sabilitytosupportTELUSHealthinpromotingthisagreementisvaluabletoo.WithourotherSourcewellcontracts,ourSourcewellrepshavevolunteeredtoprovideeducational1:1swithourprospects.They'veconsultedwithmembersinterestedinourservicesandintroducedus.They'veprovidedpromotionaltoolsandinformationalassetsweshareatconferencesandevents.Wevaluethebrainstormingsessionsandpositivemindsetsour Sourcewellrepsalwaysbringtothetabletoencouragemoreengagementwiththeirmembersandutilizationoftheagreement.WehopethatSourcewellwillcontinuethissupportifweareawardedthiscontract. TELUSHealthviewsSourcewell'sroleasessentialtomarketsuccess: 1.MarketCredibility:Sourcewell'scooperativepurchasingagreementprovidesthird-partyvalidationandreducesprocurementbarriers 2.AggregatedDemand:Accesstoalarge,pre-qualifiedpoolofparticipatingentitiesacceleratesmarketpenetration 3.SimplifiedProcurement:Streamlinedpurchasingprocessreducessalescycleandadministrativeburdenforparticipatingentities 4.PricingTransparency:Standardizedpricingthroughthemasteragreementsimplifiesdecision-making Tointegrateacustomer-awardedagreementintooursalesprocess,wetransitionknowledgeacrossoursalesteams,totheclientrelationshipleads,implementationteam,andongoingclientservicesteam.Thesalespersonensuresthatcontractualprovisions,statementofwork,andpricingareaccuratelyreflectedinthefinalcontracts.Duringimplementation,governancestructuresareinstitutedtotrackprojectsuccessandtomeasurestakeholderapproval.Thesalespersonmayattendkick-offandprojectchartermeetings.Forongoingservice,theclientrelationshipleaderandteamcommunicateknowledgeoftheserviceagreementandscope,andcollaboratewithboththeclientandserviceteamstoresolveanychallengesinmeetingthescopeofwork.TheentireTELUSteamisengagedfromday1onanyawardedcontracts. IntegrationintoSalesProcess: ·PositionSourcewellagreementaspreferredpurchasingvehicleforeligibleorganizations

		·TrainsalesteamonSourcewellvaluepropositionandmasteragreementterms ·DevelopSourcewell-specificmarketingmaterialsandcasestudies ·EstablishmetricstotrackSourcewell-originatedrevenueandparticipatingentitysatisfaction ·ParticipateactivelyinSourcewellmarketingandpromotionalactivities
40	AreyourSolutionsavailablethroughane-procurementorderingprocess?Ifso,describeyoure-procurementsystemandhowgovernmentalandeducationalcustomershaveusedit.	TELUSHealth'swellbeing,health,andretirementsolutionsaresensitiveinnature,sotermsofusemustbenegotiatedandagreeduponbeforeanyservicescanbedelivered.Thatsaid,wecanabsolutelyaccommodatee-procurementPOsforadd-onandrenewalservices.Fornewservices,however,dependingonwhatserviceisbeingrequested,additionalcontractingmayberequiredtoagreeonadditional,applicableterms.Ifagovernmentoreducationalcustomerusesane-procurementsiteexclusivelyforinvoicesandpayments,wecanaccommodatethiswithoutissue. *

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

#	Question	Response *
41	Describeanyproduct,equipment,maintenance,oroperatortrainingprogramsthatyouoffertoSourcewellparticipatingentities.Includedetails,suchaswhethertrainingisstandardoroptional,whoprovidestraining,andanycostsmayapply.	TELUSHealthofferscomprehensivetrainingtoSourcewellparticipatingentities,asrelevanttospecificclientneedsandcontractedterms.Someexamplesincludethefollowing: 1.EmployeeOrientation&Awareness: ·Customizedlaunceventsandroadshows(in-personandvirtual) ·Toolboxtalksformanagersandteamleaders ·Videos 2.Wellness-focusedManagerTraining: ·Mentalhealthawarenessandstigmareduction ·"BalanceNotBurnout"leadershiptraining ·Recognizingsignsofemployeedistress ·Supportiveconversationskills ·Resourcenavigationandreferralpathways 3.HR/BenefitsTeamTraining: ·Platformnavigationandreporting ·Programdesignandcustomization ·DataanalyticsandROImeasurement ·Bestpracticesforengagementandutilization 4.SpecializedTraining: ·Criticalincidentresponseandtrauma-informedcare ·Coachingandwellnessprogramfacilitation ·Diversity,equity,andinclusion(DEI)trainingthroughTheDiversityMovement Costsmayapplyperspecificcontractualagreement,andtravelandaccommodationsmayneedtobenegotiatedifin-persontrainingisrequested. *
42	DescribeanytechnologicaladvancesthatyourproposedSolutionsoffer.	TELUSHealthservicesfeaturemanycombinationsofthefollowingtechnologicaladvances: ·MachineLearning&AI:PoweredbyyearsofacademicresearchandCOM-Bbehaviorchangemodel *

		·Multi-PlatformExperience:Fullyresponsivewebapp+iOSandAndroidnativeappswithfeatureparity ·MicrosoftTeamsIntegration:Seamlessintegrationforworkplacecollaboration ·Third-PartyIntegrations:Links,SSO,datasharing,andAPIcapabilities ·ActivityTracking:Self-reportandconnectedwearabledeviceintegration ·Gamification:Wellbeingchallenges,rewards,andsocialnetworkingfunctionality ·DigitalIntake&Scheduling:Web-basedintakeformsandonlineappointmentscheduling ·Chat-BasedServices:Counselorchatforappointmentrequestsandreal-timesupport ·OnlineAssessments:TotalWellbeingIndex(TWI)withpersonalizedrecommendations ·Accessibility:WCAG2.1AAandADAcompliantacrossallplatforms PlannedEnhancements: ·Biweeklycontentreleasesacrosssupportedregionsandlanguages ·Enhancedwearableanddeviceintegrations ·Real-timedataanalyticsandreporting ·Newhealthchallengesandprogramsintroducedquarterly
43	Describeany“green”initiativesthatrelatetoyourcompanyortoyourSolutions,andincludealistofthecertifyingagencyforeach.	Wehaveimplementedacomprehensiverangeofgreeninitiativesacrossourorganizationandsolutions.Theseinclude: •Environmentalstewardshipthroughformalpoliciesfocusedonunderstandingandminimizingtheenvironmentalimpactsofouractivitiesandoperations,includingproactivestepstoprotecttheenvironment,wastemanagement,andenergyandwaterconservationprograms. •Wastemanagementandminimizationstrategies,suchasreducing,reusing,andrecyclingwaste,eliminatingsingle-useplastics,andpromotingapaperlessenvironmentthroughdigitalsolutionsanddefaultdouble-sidedprinting. •EmployeeengagementviaGreenCommittees/GreenTeams,trainingsessions,andregularcommunicationstoraiseenvironmentalawarenessandencouragesustainablepracticesatworkandathome. •Sustainableprocurementprograms,includingaSupplierCodeofConductandaSustainablePaperandPackagingPolicy,withaminimumscoringweightforenvironmentalandsocialresponsibilityinallsourcingevents.WealsopromoteresponsibleprocurementbyworkingwithsuppliershoshareourcommitmenttosustainabilityandbyconductingsupplierduediligenceandESGaudits. •Energyefficiencyinitiatives,suchas'LightsOut'policies,useofeco-friendlycleaningproducts,andoptimizationofprinterinventorytoreduceenergyandpaperconsumption. •Conservationprograms,includingtreeplanting(overeightmilliontreesin2024,totaling19millionover25years),andinvestmentinclean-techstartupsthroughtheTELUSPollinatorFundforGood. •Recognitionandawardsforsustainability,including: oISO14001:2015certificationforourEnvironmentalManagementSystem(certifyingagency:InternationalOrganizationforStandardization) oSustainabilityExcellenceAwardattheWorldSustainabilityAwards2022 oBronzeattheGlobalGoodAwards2022 oNamedtotheDowJonesSustainabilityNorthAmericaIndex(certifyingagency:S&PDowJonesIndices) oCorporateKnights2024Global100MostSustainableCorporationsintheWorld

		oIndustryTop-RatedESGPerformerbySustainalytics oRecognizedasoneofCanada'sGreenestEmployersbyMediacorpCanadaInc.
44	Identifyanythird-partyissuedeco-labels,ratingsorcertifications thatyourcompanyhasreceivedforthe Solutionsincludedinyour Proposalrelatedtoenergyefficiencyorconservation,life-cycledesign(cradle-to-cradle),orothergreen/sustainabilityfactors.	44Identifyanythird-partyissuedeco-labels,ratingsorcertificationsthatyourcompanyhasreceivedfortheSolutionsincludedinyourProposalrelatedtoenergyefficiencyorconservation,life-cycledesign(cradle-to-cradle),orothergreen/sustainabilityfactors.Giventhenatureofourbusiness,theenvironmentalimpactofourproductandservicesisnotsignificant.Nonetheless,weunderstandtheneedtobealeaderandserveasanexampletoourclientsandemployeesbyengaginginformalenvironmentalstewardshipanddevelopinganenvironmentalpolicythatinvolves: •Understandingtheenvironmentalimpactsofouractivitiesandoperationsandtakingproactivestepstoprotecttheenvironmentandminimizeourimpact •Obeyingallapplicableenvironmentalregulatoryrequirementsinthejurisdictionswherewehaveapresence •Advancingandpromotingtheresponsibleandefficientconsumptionofenergyandwaterthroughconservationprogramsbothinandoutsideoftheworkplace •Implementingwastemanagementandminimizationstrategiesandprogramstoreduce,re-useandrecyclethewastewegenerate •Increasingemployees'environmentalawarenessthroughstewardshipandconservationprograms •Engagingwithourkeystakeholderstohelpensurethatbroaderperspectivesonenvironmentalprioritiesandsharedresourcesareidentifiedandconsideredinourbusinessactivities •Promotingtheresponsibleuseofbusinesstraveltomanageandminimizeourcarbonfootprintthroughtheutilizationofvirtualmeetingtoolsandtechnologies •Developingandadoptingasustainableprocurementprogramandsupportingstandardstoapplyacrossoursupplychain •Measuringandreportingourenvironmentalperformancethroughourcorporatesocialresponsibilityprogram TELUSwasawardedtheSustainabilityExcellenceAwardattheWorldSustainabilityAwards2022foritsgloballeadershipandcommitmenttobuildingabetter,moresustainablefuture.HeldinMunich,judgesrecognizedTELUSforitsambitioussustainabilitystrategy,environmentalbusinesspracticesandrapidprogressondiversityandinclusion.TELUSwasalsorecognizedattheGlobalGoodAwards2022inLondon,placingbronzeasGlobalGoodCompanyoftheYear.Bothoftheseawardceremoniesrecognizeindividuals,organizations,andbusinessesaroundtheworldwhoaredrivingpositivesocialandenvironmentalchange.TELUS'recognitionattheWorldSustainabilityandGlobalGoodAwardsfollowsanumberofinternationalaccoladesrecognizingTELUS'globalleadershipinsustainability,corporatecitizenship,socialpurpose,andenvironmentalandsocialreporting,including: •DJSI:NamedtotheDowJonesSustainabilityNorthAmericaIndexforthe24thconsecutiveyear. •InJune2024,wewererecognizedbyTIMEMagazineandStatistaintheirinauguralistoftheWorld'sMostSustainableCcompanies,ranking21stoutof500companiesglobally.TELUSwasrankedasthemostsustainabletelecommunicationscompanyinCanadaandthesecondmostsustainableCanadiancompanyoverall,recognizingourgloballeadershipincorporatecitizenshipandphilanthropy,innovationmanagement,andenvironmentalandsocialimpactreportingformorethantwodecades. •InJanuary2024,wewereincludedintheCorporateKnights2024Global100MostSustainableCorporationsintheWorld;thiswasthe12thtimewehavebeeninclude

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		dsinceinceptionoftherecognitionin2005.WewerealsorecognizedintheCorporateKnightsBest * 50CorporateCitizensinCanada. •IndustryTop-RatedESGPerformerbySustainalytics. •InApril2024,wewererecognizedbyMediacorpCanadaInc.asoneofCanada'sGreenestEmployers. TheGlobalOpportunityinHealthCare Webelievethattechnologycanhelpdeliverevenbetterandmoresustainablehealthandwellnessexperiencesforourclientsandourteammembers.TELUSHealthisagloballeaderindeliveringtechnology-enabledsolutionsthathelpclientssupportthetotalwellbeingoftheirpeopleandbuildorganizationalresiliency.Wearealeaderininnovationandprovidethegreatestc

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		hoiceinclinicallyvalidatedsupportdeliveryoptions.Wecontinuallystrivetoremovepotentialserviceaccessbarriers,offeringeverythingourclientswantforthecaretheirpeopleneedandinthewaystheywanttoreceiveit,includingdigital,chat,video,telephonic. AsanorganizationTELUSishelpingtoreduceourcollectivecarbonfootprintbyinvestinginournetworks,innovativetechnologiesandsustainablebusinesspractices.TELUSwasrecognizedasoneCanada'sGreenestEmployersin2022and2023.Thecompany's2024SustainabilityReportoutlinesourenvironmental,social,andgovernancestrategyandpriorities.Itincludestheambitiousgoaltouse100percentrenewableorlow-emittingenergyby2025andhighlightshowweembedsustainablebusinesspracticesintoouroperations,which,since2010,hasresultedin: •59%fromrenewableorlow-emittingsources •10%reductioninoperational(Scope1&2)GHGemissionssince2023 •58%reductioninenergyintensitySomeofourotherenvironmentalinitiatives: •In2024,weplantedovereightmilliontreesinCanada,supportingrestorationacrossmorethan5,300hectaresofterrestrialecosystemsandbringingTELUS'totalcumulativetreeplantingcontributionsto19milliontreesoverthelast25years. •Withaninitial$100-millioncommitment,TELUSPollinatorFundforGoodsupportspurpose-drivencompanieswithenvironmentalandsocialsolutionstoscaleupoperationsandputtheirideasintopractice.TELUShasrecentlyincreasedthefund'sportfolioto30companies,announcinginvestmentsinclean-techstartupslikeFlashForestandDryadNetworks,whichusecutting-edgetechnologytopreventandmitigatetheeffectsofwildfires. •CompletingtheexternalrequiredauditstocertifyourEMStotheupdatedISO14001:2015standard.
45	Whatuniqueattributesdoesyourcompany,yourproducts,oryourservicesoffertoSourcewellparticipatingentities?WhatmakesyourproposedsolutionsuniqueinyourindustryasitappliestoSourcewellparticipatingentities?	TELUSisoneoftheworld'slargestprovidersofdigitalfinancialandhealthsolutions.OneofthebenefitsofpartneringwithTELUSHealth,isaccesstoawidevarietyofintegrateddigitalservicestofityourneeds.Thiswouldenhancetheparticipantexperienceandhelpminimizetheneedtorelyonmultiplevendorsasweareoneoftheonlyprovidersintheglobalmarketplacethatisableoffersuchavarietyunderoneumbrella. TELUSHealthoffersseveraluniqueattributesthatdistinguishourcompany,products,andservicesintheindustry: •Weareagloballeaderservingpeopleinmorethan180countries,deliveringdigitalinnovationandclinicalservicesacrossthefullspectrumofprimaryandpreventativecare.OurapproachtoEAPservicesintegratesemployeeandfamilyassistance,healthandwellness,recognition,pensionandbenefitsadministration,retirementconsulting,actuarialandinvestmentservices.OurStudentSupportapproachintegratesmentalhealth,physicalwellbeing,socialandfinancialwellness,andacademicresourcestoensurestudentsuccess. •Oursolutionsarebackedbyclinicalexcellenceandthoughtleadership,witharobustresearchagenda,evidence-basedintegratedsolutions,andadedicatedenterpriseresearchteam.Weregularlyconsultwithacademicresearchers,practitioners,andclientstoensureourservicesmeetcurrentandemergingneeds. •Wemanagethelargestclinicalnetworkintheworld,withapresenceinover180countriesandapproximately65,000globalhealthprofessionalsprovidingservicesin250languagesanddialects.Thisinfrastructureallowsustosupportdiverseandcomplexworkforcesandproviderapidsupportduringtimesofcrisis. •Innovationisacoredriverforus.Wehaveintroducedindustry-

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		firstssuchasTELUSHealthCBT(amobile,multi-modalitycognitivebehavioraltherapyplatform),Ava(anAI-enabledAutomatedVirtualAssistant),andInfluenceCare(acomprehensiveonlinementalhealthscreeninganddiagnosticprogram).Ourtechnologyplatformishighlyconfigurable,modular,andflexible,supportingcomplexrulesandofferingavarietyofdecisionsupportoptions. •OurEAPplatformoperatesonaproprietarymachinelearningengine,personalizingtheuserexperienceforhigherengagement.Weofferreal-timehealthriskassessmentswithpredictivemodellingandintegrationwithwearabledevices. •WeprovideWellbeingEngagementSpecialistsaspartofourprogramfeestoassistinallaspectsofprogramcreationanddelivery,andourplatformandprogrammingarehighlyconfigurabletoblendwitheachclient'suniqueculture. •Ourflexibilityindesignallowsustocustomizeprogramstointegratewithclients'globalwellnessstrategiesandbranding,whileretaininglocalculturalapplicability.Weworkcloselywithclientsandtheirotherhealthandwellnessvendorstoensureseamlessintegration. •WehaveastrongpresenceacrosstheUSandCanada,andadeepunderstandingofbothcountries'standardsandbestpractices.OurexecutiveleadershipandbusinessstrategyarefocusedonkeyareasofgrowthintheUSandCanada,andwearecommittedtoemployinglocaltalent. •Ourcommitmenttothoughtleadershipisdemonstratedthroughregularpublicationofresearch,reports,andwhitepapers,aswellasexpertadvicetogovernmentsandpublicsectororganizations.Wehavereceivednumerousawardsforinnovationandserviceexcellence. Weofferacomprehensive,human-centric,andholisticwellbeingstrategy,addressingtheneedsofhealthyindividualsproactivelyandthoseincrisisorhigheracuitycare.Oursolutionsaredesignedtomeetpeoplewherevertheyareontheirmentalhealthandwellbeingjourney.
46	Describeyourtechnologyasitisrelatedtoyourproposedsolutions.Includethetechnologyfortheagencyandthepersonutilizingtheservices.	TELUSHealthdeliverstheproposedsolutionsthroughvariousmethods.Thisincludesoffering1:1servicestoourclientsthroughphone,video,in-person,anddigitalpointsofaccess.Additionally,clients’employees,retirees,families,andotherscanaccessenduserservicesthroughphone,adigitalappandwebsites,enablingindividualstoconnecttoservices,tools,programs,andresourcesthatsupportoverallwell-beingandend-to-endemployeelifecycleneeds. Ourretirementandbenefitssolutionisdeliveredviaourproprietaryprogram Ariel, whichincludesthefollowingfeatures: Fullyweb-basedforeaseofaccessanduse,includingfullyresponsive-designedsites. Automatedcalculationofretroactivepremiumsthroughpervasiveeffectivedating. Enrollmentrulesarefullyvalidatedinrealtime,withclearmessagestotheusers. Easeofuse,eveninmorecomplexenrollmentscenarios,suchasmixed-Medicarefamilies. Self-service,backoffice(includingrates,overageagedependents,disabilitystatus),andbillingsystemsareallcomponentsofthesamesystem,ensuringcentralized,real-timeinteroperabilityandreliability. Managesprospectiveandretroactiveeventsconcurrently,andensurespayrollandcarriersarenotifiedaccordingly. Highlytransactional,resultinginfullaudittrailsofchangestosupportinquiries.

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		Integratedbillingandreceivablessolutionthatdirectlylinksaccountsreceivablewithmembers'benefitchoices. Automateddataexchangecapabilitieswithexternalvendorsorproviders. Massorindividualemail,web,orpapercommunicationwithmembers. Simplifiedenrollmentprocessesandlifeeventchangeswithsupportingdecisionsupporttoolstoassistwithplanchoicewhereapplicable. LeveragesAIchatbotstoassistusersinfindingandunderstandingtheinformationwhentheyneeditmost ForWellbeingsolutions,individualsaccessthesolutionviadesktopormobiledevices,usingasingle(orshared)loginandpassword,andcancompleteweb-basedintake,useonlineassessments,discoverwellbeingcontentandtoolkits,accessself-directedprograms(withoptionalcounsellorassistanceviamessaging),andbookorrequestcounsellingthroughchatandonlinescheduling.Digitalandtelephonicaccesssupportsmultiplemodalitiesincludingface-to-face,telephonic,chat,SMS/text,video,CareNow,andTELUSHealthCBT. Theplatformcapturesuser-provideddata,user-behaviordata,and(ifelected)employer-providedorganizationaldata,andusesaMachineLearning(ML)enginetopersonalizegoalsandcontentovertime;individualscanadjustprofilepreferencestocontrolhowtheirdataisusedbytheMLengine.ThesolutionleveragesAIandMLandincludesbiasdetection,ongoingperformancetrackingacrossdiverseusergroups,andmodelretrainingusingdiversedatasetstosupportfairnessandaccuracy. Fortheagency,TELUSHealthprovidesanAdministratorDashboardforreal-timedataaccesswithfiltering(e.g.,bylocationanddepartment),plusmonthly,quarterly,andannualreportingwithsegmentationandconfigurablefiltering(e.g.,bytimeandorganizationalstructure). Allfeaturesareavailableinthesupportedlanguageslisted.includingprogramming,content,andcommunications;contentlibraryarticlesarefullytranslated,andmanyvideosareproducedinEnglishwithsubtitlesinlocallanguages.UsersaresupportedthroughaWebHelpCentrewithFAQsanda"submitarequest"functionthatroutestothesupportdesk;TELUSHealthalsoprovidesphonesupportduringbusinesshoursandanemergencyphonenumberforurgentissuesoutsidebusinesshours. Theplatformiscompliant(iOS,Android&Webapp)withWCAG2.1AAandADA,supportingaccessibilityneedssuchaslowvisionandcolorblindness,hearing-impairments,andscreenreaderuse. TechnologystackincludesEAPcomponents(WindowsServer2012-2018IISVMServers;RedisCacheonRedHatVM;ElasticSearchonRedHatLinux;ASPNETC#;Angular&REACTFrontEndFrameworks;SQLServer;MongoDB;On-Premise(Q9,Atlanta)andMicrosoftAzure(AU/UK))andWellbeingPlatformcomponents(AWSCloudNativeApplication;AWSLambdas,Containers,andVMs;Node.JS,Python,andPHP;MySQLandMongoDBDatabaseandS3Storage;ReactFrontEndFramework).
47	Describeoruploadcasestudiesorstorieswhereyoursolutionsimpac	In2023,TELUSHealthcompletedananalysisofitsNorthAmericanWellbeinguserdatalakeandfoundthat,12monthsafterinitiallogin,usersincreasedphysicalactivitylevelsby15%onaverageandreducedtheirriskofdevelopingdiabetesandcar

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	tedthepeopleusingit.	diovasculardiseaseby24%comparedtomonth0;highlyengagedusersreducedrisknearlytwiceasmuchaslightlyengagedusers. ResultsweremeasuredprimarilyusingwearabledeviceandHRAdata,includingchangesindailystepcount,dailymoderateactivitylevels,andsleep. PleasefindanattacheddocumentoutliningaTELUSHealthRetirementandBenefitsSolutionclientandtheirexperienceandsuccessbeingsupportedbyourteamanddservices.
48	DescribeyouruseofAInyourcompanyandinthesolutionsyouprovide.	TELUSHealthiscommittedtothepracticeofResponsibleAIandtotheethicaluseoftechnology,includingapubliccommitmenttousingAIresponsiblyasearlyas2019. TELUSHealthusesAItoimprovecustomerexperiences,enhanceproductsandservices,sharethebestoffersattherighttime,andcontributetosocialgood,andwhereGenAIisusedthroughatechnologyprovider,strongcontrolsandsafeguardsareimplementedtoensureserviceprovidersuseinformationonlyasrequiredtoenableservicedelivery. GenAIisusedinuser-facingservicesprimarilythroughAI-poweredchatbotsthathelpusersfindinformationmorequicklyandconveniently. WithinTELUSHealth,AIisusedtoenhanceservicedeliveryandhealthoutcomes,includingAI-poweredtriagevia24/7Chattoconnectuserswithappropriateresourcesandcounsellors,AI-enhanceddigitalprogramsguidedbyAI-embeddedtools,anAI-curatedcontentlibrarythatprovidespersonalizedrecommendationsandplaninformation,andaTotalWellbeingIndex(TWI)withAIanalyticsthatgeneratestargetedrecommendationsandpredictiveanalysisforearlyriskidentification; thesefewexamplesensuresitfollowsahuman-led,tech-enabledapproachandappliesaresponsibleAIframeworktoensureAIisdeployedinamannerthatisethical,fair,transparent,andaccountable.RetirementandBenefitsSolutionscustomerservicerepresentativesleverageAIasaknowledgebase. AIisalsousedtoenhanceworkflowconnectionswithinourbenefitadministrationplatform IntheTELUSHealthbroadertechnologyecosystemweleverageAI,includingmachinelearningwithintheplatformstodeliverpersonalized,engagingmemberexperiences,andproductmanagementisevaluatingAIopportunitiestoenhanceoverallservices,suchreducingimplementationtimelinesandimprovingoverallservice. ForGenAI,TELUSHealthusespubliclyavailableinformation(e.g.,websites,articles,andopendata)andinternaldatasuchasprocessdocumentation,withservicesprimarilyfocusedonpublicknowledgeandinternalcontent; mostusesdonotinvolveprocessingPersonalInformation. TELUSHealthmaintainsstrictdataprivacyandsecuritymeasuresforAI,including robustprivacycontrols(anonymization,encryption,securestorage),adherencetoethicalAIprinciplesandregulatorycompliance,regularriskassessmentsandmonitoring,andhumanoversighttoprotectproprietaryinformation,withgovernancereviewsbytheData&TrustOfficeandSecurityOffice; forchatbotinteractions,chatsessionsrequireauthenticationthroughtheparticipantwebportalanddataisencryptedusingtransportlayersecurity(TLS),includingtr

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		ansferofAIbotsessiondataaspartofthewebsession. RiskmitigationsforAIincludebiasdetectionandmitigation,robustdataprivacyandsecuritycontrols,privacyimpactassessments,memberconsentandtransparency,anonymizationandpseudonymization,regularmonitoringandauditing,continuousmonitoringandevaluation,andhumanoversightandexplainabilitymeasurestosupporttransparency,fairness,andaccountability.
49	4 Whatsecurityprotocolsdoyouhaveforyourtechnologyandtheinformationinit?	TELUSHealthmaintainsadocumentedprivacypolicyavailableonitscorporatewebsiteandappliesrigorousstandardstoprotecttheconfidentiality,security,andaccuracyofpersonalinformation,withclientdatastoredonlyonTELUSHealthdevicesandsafeguardedtopreventaccessbyexternalparties.TheTELUSHealthPrivacyPolicycomplieswithapplicablefederalandprovincialprivacylegislation,andadditionalinformationisavailableathttps://www.telus.com/en/health/about-telus-health/privacy/corporate. Securitycontrolsincludelayeredsafeguardssuchaspasswords,useraccountlockoutsandpasswordresetprocedures,idle-timelimits,firewall-controlledwebsiteaccess,changemanagementcontrols,regularpatchrenewal,NetworkIntrusionDetectionSystem(NIDS)withdailylogreviews,restrictedserver-roomaccess,dailyserverbackups,andoffsitebackupstorage.Clientwebsitesarerestrictedviauser|Dauthenticationandpasswordprotectionwithself-servepasswordreset,andmayalternativelyusesinglesign-onthroughtheclientnetwork/webportal.Internet-to-intranetcommunicationsareprotectedbyfirewallsandNIDSinstalledbehindeachinternetfirewall. TELUSHealthmaintainsacomprehensivewrittenInformationSecurityProgramalignedtoacceptedindustrystandards,includingNIST800-53Rev.5,ISO/IEC27001,ISO/IEC27002,andTrustServicesPrinciplesandCriteriaforSecurity,Availability,ProcessingIntegrity,Confidentiality,andPrivacy,andrequiresemployees,subcontractors,andotherthirdpartiestoread,understand,andsignconfidentialityornon-disclosureagreementsthatarereviewedregularly.TELUSHealthisauditedthroughaSOC2TypeIIreportforsecuritycontrolsbasedonTrustServicesCriteriastandards. Accessandgovernancecontrolsincluderole-basedaccesscontrol(RBAC),least-privilegeaccessassignment,segregationofduties,datainputvalidation,webapplicationfirewalls,securecodingtechniques,andauditlogging,withDallasISDadministratorsabletomanagerolesthroughaself-serviceportalthatsupportsreal-timerolechanges,periodicaccessreviewsandattestations,automatedaccessterminationprocesses,andauditloggingofaccesschanges.Privilegedaccessrequiresadditionalauthenticationfactors,serviceaccountaccessisstrictlycontrolledandregularlyaudited,andaccesspatternsaremonitoredforunusualactivity. Dataprotectionincludesencryptionintransitandatrest,includingTLSforwebapplications,securefileexchangesviaSFTPwithPGPencryption,andencryptionofstaticdatausingAES-256.Datatransmittedoverthepublicweb/internetisencrypted,fileexchangesmayusesecurefileuploadoverHTTPS,anddataatrestisencryptedonstorageusing

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		AES256-bitencryption. Securityoperationsandmonitoringincludesecuritylogging,anti-malwaresoftware,incidentmanagementandresponseplanning,externalpenetrationtesting,andSIEMmonitoring24/7byathird-partySOC.TELUSHealthalsoperformsregularriskassessmentsandreviewsandmaintainsdetailedloggingtosupportongoingaudits. Work-from-homecontrolsincludecompletionofawork-from-homeagreementpriortothestartdate,managerandteam-leadmonitoringandqualityaudits,cameraactivationtovalidateasecureworkplace,avoidanceofremovablestorage(orencryptionwhenrequired),useofcompany-preapprovedcloudordatacenterstorageinsteadoflocalorpersonalstorage,andcontrolledhandling,transport,anddestructionofphysicalmaterials,withcorporatepoliciesandprivacylegislationcontinuingtoapplytopersonalinformation.
50	Describetheoptionsavailabletorewardpeoplewithhealthincentives.	TELUSHealthWellbeingenablesaconfigurablepoints-basedrewardsmodelwhereemployeesearnpointsforactionsyoudefine,includingparticipatinginchallenges,trackingactivities,achievingmilestones,signingupforevents,andcompletingtheHRAorattendingabiometricscreening.. Pointscanunlocklevelsintheplatform,withrewardsparametersconfigurable,includingwhichbehaviorsarerewarded,thepointsneededtoreachalevel,therewardsoffered,andhowfrequentlyrewardscanbeearned.. RedemptionoptionsincludesendingdatatofacilitateHSA/WSAorpayrolldeposits,premiumreductions,charitabledonations,raffleprizedraws,andanin-appRewardsStorefeaturingimmediatelyusablee-giftcardsthatsupport50+globalcurrenciesandlocaloptionsfornumerouscountries. TELUSHealthWellbeingcanalsoawardpointsforoff-platformactivitiesbyingestingexternaldataviacsvuploadandcanprovidereportingorsenddataidentifyingwhohasmetdefinedthresholdstosupportoff-platformrewardssuchasdaysoff. Incentivedesignscanbelocalizedbycountry(e.g.,Canadavs.USA)andcanbesegmentedbelowcountrylevel(e.g.,benefitseligiblevs.nonbenefitseligible;unionizedvsnonunionized). Forvariouscountries,rewardscanbedeliveredviadigitalgiftcardswithlocaloptionsorcurrencies;wherelocaloptionsarenotavailable,universalrewardssuchasacreditcardgiftcardinUSDoralternativemodelssuchasearninganextradayofvacationmaybeused.

Table 5B: Value-Added Attributes

#	Question	Certification	Offered	Comment	
51	SelectanyWomenorMinorityBusinessEntity(WMBE),SmallBusinessEntity(SBE),orveteranownedbusinesscertificationsthatyourcompanyorhubpartnershaveobtained.Uploaddocumentationandalistingofdealerships,HUBpartnersorre-sellersifavailable.Selectallthatapply.		Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,orWOSB.	*
52		MinorityBusinessE		TELUSHealthisnotaMBE,WBE,SBE	*

		nterprise(MBE)	Yes No	,DOBE,VBE,SDVOB,SBE,SDB,or WOSB.
53		WomenBusinessEnterprise(WBE)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
54		Disabled-OwnedBusinessEnterprise(DOBE)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
55		Veteran-OwnedBusinessEnterprise (VBE)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
56		Service-DisabledVeteran-OwnedBusiness (SDVOB)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
57		SmallBusinessEnterprise(SBE)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
58		SmallDisadvantagedBusiness(SDB)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *
59		Women-OwnedSmallBusiness(WOSB)	Yes No	TELUSHealthisnotaMBE,WBE,SBE,DOBE,VBE,SDVOB,SBE,SDB,or WOSB. *

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

Provide detailed pricing information in the questions that follow below.

#	Question	Response *
60	Describeyourpaymenttermsandacceptedpa	PaymenttermsareNet30daysfrominvoicedate. Acceptedpaymentmethodsincludepre- *

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	ymentmethods.	authorizeddebit(PAD),recurringcreditcard(PAP)payments,DirectDebit,check,andelectronicfundstransfer. Invoicingcanbeissuedmonthly,quarterly,orannually,andemployeeeligibilityfilesareusedtoconfirmheadcountforinvoicingpurposes;invoicescanbeissuedinsomelocalcurrencies,thoughfeesarequotedinUSD.
61	Describeanyleasingorfinancingoptionsavailableforusebyeducationalorgovernmentalentities.	N/A
62	Describeanystandardtransactiondocumentsthatyouproposetouseinconnectionwithanawardedagreement(orderforms,termsandconditions,servicelevelagreements,etc.).Uploadalltemplateagreementsortransactiondocumentswhichmaybeproposedto ParticipatingEntities.	EachofthefollowingdocumentsissubjecttochangeopentonegotiationandconfidentialbetweenTELUSHealthandourindividualclientsandtheirmembers.SamplescanbeprovidedinadvanceofanySourcewellParticipatingEntity'sinterestincontracting,inconnectionwithanawardedagreementwithSourcewell. TELUSHealthWellbeingrequiresaplatformservicesagreementthatincludesanorderform,standardtermsandconditions,andascheduleofservices.TELUSHealth'sretirementandbenefitsservicesrequireSourcewellparticipationentitiestocompleteamasterservicesagreement,astatementofwork,andimplementationrequirements.
63	DoyouaccepttheP-cardprocurementandpaymentprocess?Ifso,isthereanyadditionalcosttoSourcewellparticipatingentitiesforusingthisprocess?	Yes,weacceptP-cards/chargecardsatnoadditionalcost.
64	Describeyourpricingmodel(e.g.,line-itemdiscountsorproduct-categorydiscounts).Providedetailedpricingdata(includingstandardorlistpricingandtheSourcewelldiscountedprice)onalloftheitemsthatyouwantSourcewelltoconsideraspartofyourRFPresponse.Ifapplicable,provideaSKUforeachiteminyourproposal.Uploadyourpricingmaterials(ifapplicable)inthedocumentuploadsectionofyourresponse.	TELUSHealthRetirementandBenefitSolutionscontractsviaPEPM,PEPY,orfixedpriceratesdependinguponthescopeofservices.Invoicingfrequencyismonthly,basedoncensusdataforinvoicing;TELUSHealthcaninvoiceinsomelocalcurrencies,althoughfeesarequotedinUSD. TELUSHealthWellbeingpricingisbasedonaUnitPricemultipliedbytheMinimumQuantityofDirectEligibleUsers(ortheactualDirectEligibleUserpopulationasupdated),withFeesinvoicedinadvanceonthefrequencyidentifiedontheOrderForm.Invoicingfrequencycanbeannual,quarterly,ormonthly,andemployeeeligibilityfilesareusedtoconfirmheadcountforinvoicing;TELUSHealthcaninvoiceinsomelocalcurrencies,althoughfeesarequotedinUSD. TELUSHealthmayadjusttheUnitPricebynotice,withacceptancedeemedifnoobjectionisreceivedwithinthirty(30)days. Servicesperformedon-sitemaybeinvoicedseparatelyasexpenses,includingtransportationandaccommodationcosts,andrequestsformodifications,customizations,enhancements,ordedicated/additionalpersonneloutsidestandardfeaturesorsupportrequireaStatementofWorkwithadditionalfees;travelexpenses,materialsprintingcosts,gift

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		cardsredeemedintherewardsstore(ifapplicable),andotheragreedout-of-pocketexpensesmaybechargedasanexpenseplusa5%handlingcharge,andanyexpenseincurredwiththepurchaseofactivitytrackingdevicesand/orpromotional/marketingproductsistheSponsoringOrganization'sresponsibility. Paymentisduewithinthirty(30)daysoftheinvoicedate,andinterestonoverdueinvoicesaccruesat1.5%monthlystartingfive(5)calendardaysaftertheduedate.
65	Quantifythepricingdiscountrepresentedbythepricingproposalinthisresponse.Forexample,ifthepricinginyourresponserepresentsapercentagediscountfromMSRPorlist,statethepercentageorpercentagerange.	N/A
66	Howdoyoumeasureeffectivenessandreportoutcomes?Describehowtheeffectivenessofyoursolutiongeneratessavingstoagenciesthatuseyourservices.	TELUSHealthbenefitsadministrationservicesofferanend-to-endsolutionwithaproventrackrecordofdrivingresults,withservicesincluding: BenefitDecisionSupport VoluntaryBenefits SpendingAccounts LeaveManagement Eachoftheseserviceslendthemselvestothefollowingbenefits: Betterdatamanagementandreporting,enhancingstrategyandplanningopportunities Betteradministrationtoincreaseefficiencyandeffectiveness Betteruserexperienceandsupportforallstakeholders Reducedcostsandimprovedprogramoutcomes Wedevelopedatask-drivensystemthat: Integratesallrelevantprocessesandperformancemetrics Simplifiesworkflowmanagement Providesuserswiththeabilitytoproducearobustarrayofcustomizedfinancialandclaimdatareports Includespreconfigured“workrules”toensureconsistentapplicationthroughoutanorganization Thesystemstreamlinesthecasemanagementprocessandresultsintimeandcostsavingsforallstakeholders. TELUSHealthWellbeingmeasureseffectivenessusingquantitativeandqualitativemethods,includingusagemetrics(e.g.,openrates),behavioraldata(e.g.,participationinwellbeingactivitiesandutilizationofsupportresources),andqualitativeassessments(e.g.,interviewsandfocusgroups),withadditionalfeedbackgatheredviaEmployeeWellbeingChampionsandevaluationtiedtoimpactonwellbeingmetricssuchasstresslevels,satisfaction,andoverallhealthandproductivity. Todemonstrateprogramrigorandoutcomes,wedefineclearclient-specificgoalsandobjectivesgroundedinbaselinedataandrelevantmetrics,implementinterventions,andcontinuouslycollectandanalyzeongoingquantitativeandqualitativedatatomeasureimpactandcommunicatefindingstostakeholders.

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		OutcomesarereportedthroughanAdministratorDashboardthatprovidesreal-time,filterabledata(e.g.,bylocationanddepartment)andthroughmonthly,quarterly,andannualreportingdeliveredbyaWellbeingEngagementSpecialistorClient Success&EngagementManager,includingreportssuchasaggregatedactivities,engagement,challenges,notificationsreadrates,registrations,contentviews,userstatus,wellbeingscore(aggregate),eventattendance,andinterests&concerns,alongsidetrackingUserandAdministratorNPS,helpdeskinquiries/responsetime,andsurveyfeedback. Savingsaregeneratedthroughreducedadministrativetimerequiredtorunaglobalwellbeingprogram,supportedbytheWellbeingEngagementTeamandplatform automations,andthroughretention-relatedsavingswhereincreasedemployeeloyaltyandconnectivityreducethelikelihoodofdeparture,decreasingrecruiting,hiring,andtrainingcosts.
67	Describeanycontributionorsubsidyyouwillapplytowardshealthincentivesforparticipantsofaparticipatingentity's wellnessprogram.	N/A
68	Describeanyquantityorvolumediscountsorrebateprogramsthatyou offer.	Ourpricingscalesaspopulationsincrease.
69	Describeanyperformanceguarantees.Explainthemethodsusedtoreportprojectionsandmeasurableoutcomes. Also,provideexamplesintheuploadsection.	TELUSHealthprovidesperformancetargetsforTH1PlatformAvailability(99.95%)andTH1ServiceAvailability(99%),alongwithincidentresponse-timetargetsbypriority(P1:8hrat98%;P2:1dayat98%;P3:2daysat95%;P4:3daysat95%)andincidentresolution-timetargetsbypriority(P1:8hrat99%;P2:3daysat99%;P3:10daysat95%;P4:15daysat95%).Italsocommitstorecoveryandrestorationof100%ofdataassociated withtheTHIassessment,digitalwallet,progressindigitalclinicalprograms,employeeprofileinformation,andemployeepoints/discountinformationwithin24-72hours,andprovidesAppSupportAvailability9am-9pmGMTMondaytoFridaywithasystem-generatedacknowledgementemailwithin10minutesandanagentemailresponsewithinthesameday(MondaytoFriday). Toreportprojectionsandmeasurableoutcomes,TELUSHealthestablishesclear goalsandobjectiveswitheachclientbasedonbaselinedataandrelevantmetrics,implementsinterventions,gathersongoingdatatotrackprogress,analyzesquantitativeandqualitativedatatomeasureimpact,andcommunicatesfindingstostakeholders.ROI/VOIreportingisdeliveredviamonthlyandquarterlyreportssharedasadeckandreviewedwithDallasISDduringongoingstatusmeetings(typicallyweeklyorbi-weekly,oraspreferredbyyou).Baselinemeasurementandoutcometrackingaresupportedthroughareal-timeHealthRiskAssessment(HRA)collectedatinitialregistration(aggregateandanonymized)andupdatedautomaticallyovertime,withscorechangesusedtoevidenceriskreductionandcorrelateimprovementstolonger-termoutcomessuchasreductioninclaims,absenteeism,andemployeeturnover. Examplesofmeasurableoutcomesincludeanaverage15%increaseinuserphysicalactivityafter12monthsofplatformuseandaverageriskreductionsfortype2dia

		betes(21%)andcardiovasculardisease(23.3%),aswellasreductionsinarthritis,lungdisease,andbackpainrisk(23.8%).ReportingcanalsobeprovidedthroughanAdministratorDashboardwithself-serve,real-timeprogramdata,withfiltersincludingtimeperiod/date-rangeandorganizationalstructure;ad-hocreportscanincludedemographicfilters.StandardreportsavailableincludeAggregatedactivities,Engagement,Rewardsoverall(bydaterange),Rewardsoverall(byusers),Challengesoverall,Streampostsoverall,Notificationsoverall,Registrationsoverall,Contentoverall,Usersoverall(byusers),Wellbeingscoreoverall,Eventattendance,andInterests&concerns. RetirementandBenefitsSolutionsperformanceguaranteesarenegotiatedatthetimeofcontractingwithindividualParticipatingEntitiesandsubjecttocustomization.
70	Proposeamethodoffacilitating“sourced”productsorrelatedservices,whichmaybereferredtoas“openmarket”itemsor"non-contracteditems".Forexample,youmaysupplysuchitems“atcost”or“atcostplusapercentage,”oryoumaysupplyaquoteforeachsuchrequest.	TELUSHealthwillfacilitatesourced/open-marketitemsandrelatedservicesthroughanexecutedStatementofWork(SOW)thatdefinesscope,fees,andanyapplicableexpenses. TELUSHealthmayalsopassthroughreasonableout-of-pocketexpensesassociatedwithsourceditemsorrelateddelivery(e.g.,travel,materialsprinting),plusahandlingchargeofupto5%oranadministrativefee(tobedeterminedpercontractneeds),subjecttoprioragreementandalignmentwiththeSponsoringOrganization'scommunicatedpolicy. WheresourceditemsinvolveWellbeingrewardsfulfillment,costsarehandledonapass-throughbasisforredeemedgiftcards,plusTELUSHealth'sstandardprocessingfee.
71	Identifyanyelementofthetotalcostofacquisitionthatis NOTincludedinthepricingsubmittedwithyourresponse.Thisincludesalladditionalchargesassociatedwithapurchasethatarenotdirectlyidentifiedasfreightorshippingcharges.Forexample,listcostsforitemslikepre-deliveryinspection,installation,setup,mandatorytraining,orinitialinspection.Identifyanypartiesthatimposesuchcostsandtheirrelationshiptothe Proposer.	Additionalchargesnotincludedinthefeessetoutontheorder Formmayinclude: ·On-siteservicedeliveryexpensesincurredbyTELUSHealth(includingtransportationandaccommodation),whichareinvoicedseparately. ·ProfessionalServicesassociatedwithmodification,customization,orenhancementofServicesoutsidestandardfeaturesorsupport,whichrequireanexecutedSOWandaresubjecttoadditionalfees. ·Travelexpenses,materialsprintingcosts,giftcardsredeemedintherewardsstore(ifapplicable),andotherreasonableout-of-pocketexpensesincurredbyTELUSHealthand/orPlatformPartner,whichmaybechargedasanexpenseplusa5%handlingcharge(withprioragreementandinaccordancewiththeSponsoringOrganization'spolicycommunicatedtoandagreedtoinadvance). ·A5%processingfeeonredeemedrewards(inadditiontothecostofthereward). ·Activitytrackingdevicesandpromotional/marketingproducts(e.g.,waterbottles),whicharetheresponsibilityoftheSponsoringOrganization. Whereapplicable,Partiesthatmaybeinvolvedinimposingordrivingsuchcostsinclude TELUSHealthanditsPlatformPartner(asreferencedforProfessionalServicesandrelatedexpenses).Whereapplicable,TangoRewardsmaybeinvolvedindigitalgiftcardfulfillmentforoptionaluserredemptionthroughtheWellbeingplatformRewardsStore.
7	Iffreight,delivery,orshi	N/A

2	ppingisanadditionalcosttotheSourcewellparticipatingentity,describeindetailthecompletefreight,shipping,anddeliveryprogram.	
73	Specificallydescribefreight,shipping,anddeliverytermsorprogramsavailableforAlaska,Hawaii,Canada,oranyoffshoredelivery.	N/A
74	Describeanyuniquedistributionand/ordeliverymethodsoroptionsofferedinyourproposal.	N/A
75	Specificallydescribeanyself-auditprocessorprogramthatyouplantoemploytoverifycompliancewithyourproposedagreementwithSourcewell.Thisprocessincludesensuringthat Sourcewellparticipatingentitiesobtaintheproperpricing.	OursalesandCSMteamswillbetrainedonSourcewellandhowtorepresentyourorganization.
76	Ifyouareawardedanagreement,provideafewexamplesofinternalmetricsthatwillbetrackedtomeasurewhetheryouarehavingsuccesswiththeagreement.	CountofhowmanySourcewellmembershaveinquiredaboutservicesinadditiontohowmanySourcewellmemberopttomoveforwardwithservicesthatTELUSHealthisabletosupport.
77	ProvideaproposedAdministrationFeepayabletoSourcewell.TheFeeisinconsiderationforthesupportandservicesprovidedbySourcewell.TheproposedAdministrativeFeewillbepayabletoSourcewellonallcompletedtransactionstoParticipatingEntitiesutilizingthisAgreement.TheAdministrativeFeewillbecalculatedasastatedpercenta	TELUSHealthisproposingaflexibleAdministrativeFeebasedonthetotalcontractvalueoftheengagementrangingfrom0.5-3%.Thatwouldbebasedontheinitialvalueofnew,originalcontracts.

	ge,orflatfeeasmaybeapplicable,ofallcompletedtransactionsutilizingthisMasterAgreementwithinthepreceding ReportingPerioddefinedintheagreement.	

Table 6B: Pricing Offered

#	The Pricing Offered in this Proposal is: *	Comments
78	The pricing offered is consistent with standard market pricing typically offered to individual municipalities, universities, or school districts.	TELUSHealthoffersflexibleandcompetitivepricingreflectiveofclientsizeandservicesrequested. *

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

#	Question	Response *
79	Provideadetaileddescriptionofa lltheSolutionsoffered,including usedSolutionsifapplicable,offeredintheproposal.	TELUSHealthWellbeinghasover12yearsofexperiencedeliveringglobalservicesforlargeclients,andhasfurtherdevelopedexpertiseinmanagingcomplexglobalclientprogramsfollowingtheacquisition. TELUSHealthWellbeingisaflexible,comprehensive,user-friendlyworkplacewellnessplatformdesignedtoengageemployeesandsupporthealthyhabitdevelopmentthroughasuiteofholistichealthandwellbeingfeatures,anditiscurrentlyavailableto15Meligibleendusersin80countriesglobally.ItusestheCOM-Bbehaviorchangemodelandoffersaninteractiveexperiencethatincludeswellbeingchallenges,campaigns,tools,andservicestosupportpersonalhealthandwellbeinggoals. KeyWellbeingcapabilitiesinclude: -Preventivehealthscreeningandassessments -Healthriskassessmentsandbiometrictracking -Wellnessprogramadministrationandincentives -Mentalhealthandcounselingservices -Fitnessandnutritionprograms -Stressmanagementandresiliencetraining -Workplaceergonomicsandsafetyinitiatives -Wellnesschallengesandengagementprograms -Healthcoachingandbehaviorchangesupport -WellbeinganalyticsandROIreporting -Integrationwithbenefitsprogramsforholistichealthmanagement Ourapproachspansservicesinbenefitsadministration,retirementandfinancialsolutions,billingmanagement,leavemanagement,employeeandfamilyassistance,andrewards,recognitionandperkswithahighlyflexibletechnologyplatformthatimprovesourclients’performance. *

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TofurtherassistSourcewellmemberswithHumanResourcesservicesandneeds,TELUSHealthisproudtoofferadditionalsupportancillaryandcomplimentarytoourEmployeeAssistanceServicesandStudentSupportprogramservices.Wearehappytoserveasasingleproviderofmentalhealth,wellbeing,andend-to-endemployeelifecyclesolutions,fromrecruitingteammembersthroughtheirjourneyasemployees,includingtheir(andtheirfamilies')healthandwellbeingforthedurationoftheircareer,andtheirtransitiontoretirement.Ourexpertiseistokeeporganizationbestinterestinmind,whileensuringahelpfulandpositiveexperienceforyourteammembers,too.

Assuch,TELUSofferscomprehensivehealthandwelfarebenefitsadministrationthatcoversthefullspectrumofemployeebenefitmanagement.Ourservicesincludeplangovernanceandcompliance,individualaccountmanagement,investmentoptionoversight,andseamlesspayrollintegrationforcontributionprocessing.Weprovidedetailedparticipantstatements,retirementreadinessanalysis,andprojectionstohelpemployeesplantheirfinancialfutures.Additionally,weadministerspecializedspendingaccountsolutionsincludingFSA(FlexibleSpendingAccount)andHSA(HealthSavingsAccount)programs,withfullclaimsprocessing,complianceverification,andtaxreportingsupport.Ourspendingaccountofferingsextendtocommuter/transitbenefits,dependentcareaccounts,andhealthcarereimbursementaccounts,allcoordinatedformaximumemployeebenefitoptimization.

Ourpensionandbenefitsadministrationissupportedbyrobustoperationalinfrastructureincludingdirectbillingwithtransparent,itemizedstatementsandcostallocationcapabilities.WehandleCOBRAprocessingwithcompleteeligibilitydetermination,premiumbilling,andregulatorycompliance,ensuringorganizationsmeetallfederalandstaterequirements.Ourcallcentersupportservicesprovide24/7multilingualassistanceforbenefitsinquiries,claimsresolution,enrollmentsupport,andtechnicalportalassistance,allbackedbycustomizableservicelevelagreementsandqualityassurancemetrics.

Toenhanceemployeeengagementanddecision-making,TELUSprovidesaBenefitDecisionSupportToolwithinteractiveplancomparisons,personalizedrecommendations,andscenariomodeling,alongsidecomprehensivebenefitenrollmentcounselingthroughone-on-onesessionsandgroupeducationmeetings.Wealsoofferhealthcareadvocacyservicesincludingpatientcarecoordination,claimsappealssupport,medicalbillreview,andchronicconditionmanagement.Finally,ourleavemanagementservicesadministerPTOpolicies,medicalleave(includingFMLAcompliance),disabilitycoordination,parentalleave,andsabbaticals,withfullintegrationtopayrollandHRsystemsandcompliancewithallapplicablefederal,state,andlocalregulations.

TELUSHealthhasbeenprovidingpensionandbenefitsadministrationservicesacrossNorthAmericaformorethan50years.Weareaglobalhealthandwellbeingleaderencompassingphysical,mentalandfinancialhealthdeliveringanintegratedapproachtowellbeingthroughourcloud-basedplatform.Weaimtobethemosttrustedwellbeingcompanyintheworldbybuildingthehealthiestcommunitiesandworkplacesontheplanet.

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Ourbusinessisbuiltuponapowerfulprinciple:Happy,healthyandempoweredpeopleartheheartofhigh-performingorganizations.TELUSHealthimprovesthefinancialhealthandwellbeingoforganizationsandindividualswithsustainableandflexibleretirementandbenefitssolutions.Justaswithphysicalandmentalhealth,webelievethatfinancialhealthandsecurityisakeycomponenttooverallhealth.Ourrenewedstrategyputsallofourpartnersandcustomersatthecenterofeverythingwedobyfocusingonthetopmarketsegmentsforhealthandwellbeingservices,retirement,benefitsandadministrationproductsandservices,andhealthcaretechnologysolutions.Byimprovingaperson'slifeandwellbeing—theywillbehappier,healthierandultimatelymoreengagedandproductiveatwork.Ourapproachspansservicesinpensionandbenefitsadministration,retirementandfinancialsolutions,billingmanagement,leavemanagement,employeeandfamilyassistance,andrewards,recognitionandperkswithahighlyflexibletechnologyplatformthatimprovesourclients'performance.
OurproprietaryDefinedBenefits(DB)andHealth&Welfare(H&W)benefitsadministrationplatformisahighlyconfigurable,modularandflexiblesystemdesignedtoefficientlyimplementandexecuteclient-specificprovisionsandprocesses.Itisrules-based,effective-datedandevent-drivenwithanintegratedworkflowthatsignificantlyreducesroutineadministrativeprocessing.

WeunderstandDBandH&Wbenefitplansfromatechnology,customerservice,andregulatoryperspective.Wehavecontinuallyinvestedinourpensionandbenefitsadministrationservicedeliverymodeltoanticipatethechangingneedsofourclients.Theseinvestmentsinourinfrastructure,technology,peopleandprocesseswillhelpclientstoquicklytransitiontoouroutsourcingservicemodelwithlessrisk,elevatetheoverallexperienceforyourparticipants,andprovideyouwithgreaterefficienciesandflexibilityforthefuture.

Wewillprovidevalueasapartnertotheclientthroughthefollowing:
Weareflexibleinourservicedelivery.
Wecantransitionyouefficientlytoouroutsourcedservicemodelbecausewehave:
ExpertDBandH&Wresources
FlexibleDBandH&Wbenefitadministrationtechnologytosupportclient'scustomizationsandcomplexities
Decadesofexperienceinprovidingtheseservicesandcanleverageprovenadministrationprocesses
Wecanprovideahigh-touchsolutionthatelevatesyourparticipants'experience.
Wehaveacomprehensiveservicemodelthatwillengageplanparticipantsthrough:
Education—weoffereducationalcontent,decisionsupporttools,participantspecificalerts,emailsandtextmessages,videosandarticlestoeducateyourparticipantsontheirbenefitsandpensionplansincludingretirementplanning.
Communication—wecandevelopstrategiccampaignsduringtransitionandongoingservices.
Technology—yourparticipantswillhaveaccesstotherighttools/technologyforonlinebenefitplaninformationandenrollment,decisionsupporttools,pensionestimatesandretirementplanning.
Customerservice—wehavedeepexpertiseindeliveringahigh-qualityservicecenter.Ourcustomerservicephilosophyisthatourrepresentativesareanextensionofyourorganizationresultinginhigh-touchservicewithfocusonqualityandnotcalllength.
WearetrulyapartnertoourclientsinthemanagementofyourDBandH&Wbenefitplans.Wesupportyou,theplansponsor,inabroadrangeofareasthatwillreducerisksandensuresuccess:
Reducedcompliancerisk throughrobustqualitycontrol,servicelevelagreements,andperfor

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		manceguarantees Highdegreeofautomation,whichleadstogreaterefficiency,consistency,andmorecostsavings Provenimplementationmethodologiesandexpertresourceswiththegoalofqualityfromdayone Transparentcostmodelwithnohiddencostsandthegoaltoworkwithinyourbudgetobjective KeycapabilitiesofourHealthandWelfareBenefitsAdministrationandPensionAdministrationservicesinclude: Comprehensivemanagementofhealthandwelfarebenefits: -Plangovernanceandcompliancewithregulatoryrequirements -Individualaccountmanagementandrecord-keeping -Investmentoptionmanagementandmonitoring -Contributionprocessingandallocation -Participantstatementsandreporting -Retirementreadinessanalysisandprojections -Integrationwithpayrollsystemsforseamlesscontributionprocessing SpendingAccountSolutions FSA(FlexibleSpendingAccount)Administration -Plandesignconsultationandcompliancesupport -Claimsprocessingandadjudication -DependentCareFSAandMedicalFSAadministration -Carryoverandgraceperiodmanagement -Participanteducationandenrollmentsupport -Real-timeclaimstrackingandreimbursement -Year-endreconciliationandreporting HSA(HealthSavingsAccount)Administration -Accountestablishmentandmaintenance -Contributiontrackingandcomplianceverification -Investmentmanagementoptions -Claimsprocessingandreimbursement -Tripletaxadvantageoptimization -Participantstatementsandtaxreporting(Form5498-SA) -Integrationwithhealthplandata SpendingAccounts -Commuter/Transitbenefitsadministration -Dependentcareaccounts -Healthcarereimbursementaccounts -Flexibleaccountstrategyoptimization -Multi-accountcoordinationandmanagement DirectBilling -Directbillingtoemployersforplanadministrationfees

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-Transparent,itemizedbillingstatements
-Paymentprocessingandreconciliation
-Costallocationbydepartmentorcostcenter
-Budgetforecastingandcostanalysis
-Integrationwithaccountingsystems
-Detailedbillinganalyticsandreporting

COBRAProcessingandsupport
-COBRAeligibilitydeterminationandnotification
-Premiumbillingandpaymentprocessing
-Coveragecontinuationmanagement
-Qualifyingeventadministration
-Compliancewithfederalandstateregulations
-Participantcommunicationandsupport
-Terminationprocessingandtracking
-Regulatoryreportinganddocumentation

BenefitDecisionSupportTool
-Interactivebenefitscomparisontool
-Personalizedbenefitrecommendationsbasedonemployeeprofile
-Cost-benefitanalysisfordifferentplanoptions
-Scenariomodeling(what-ifanalysis)
-Totalrewardsstatementgeneration
-Mobile-accessibleplatform
-Real-timeeligibilitydetermination
-Integrationwithemployeedatasystems
-Analyticsondecisionpatternsandtoolusage

BenefitEnrollmentCounseling
-One-on-onecounselingsessions(phone,video,orin-person)
-Groupenrollmentmeetingsandeducationsessions
-Multilingualsupportservices
-Benefitseducationmaterialsandresources
-Plancomparisonassistance
-Specialenrollmenteventsupport
-Newhirebenefitsorientation
-Ongoingenrollmentsupportthroughouttheyear
-Counselortrainingandcertification

HealthcareAdvocacy
-Patientadvocacyandcarecoordination
-Healthcareproviderandfacilityrecommendations
-Claimsreviewandappealssupport
-Medicalbillreviewandnegotiation
-Secondopinionservices
-Caremanagementforchronicconditions
-Medicationtherapymanagement
-Healthcarecostoptimizationstrategies

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		-Referralcoordination -24/7accesstohealthcareadvocates CallCenterSupportServices -Benefitsinquiryandsupport(inbound/outbound) -Claimsstatusinquiriesandresolution -Enrollmentsupportandassistance -Leaveadministrationinquiries -COBRAadministrationsupport -Technicalsupportforonlineportals -Multilingualsupportcapabilities -Performancemetricsandqualityassurance -Customizableservicelevelagreements(SLAs) -Integrationwithknowledgemanagementsystems -Workforceschedulingandmanagement LeaveManagement -PaidTimeOff(PTO)policyadministration -Medicalleavemanagement(includingFMLAcompliance) -Short-termandlong-termdisabilityleavecoordination -Parentalleaveadministration -Sabbaticalandunpaidleavetracking -Leaveaccrualcalculationsandbalancemanagement -IntegrationwithpayrollandHRsystems -Compliancewithfederal,state,andlocalleavelaws -Employeeself-serviceleaverequestportals -Managerapprovalworkflows TELUSHealthistheonlyHRconsultingandtechnologycompanythattakesanintegrativeapproachtotoday'scomplex,health,retirementandwellnesschallenges.Thisapproachenablesustodelivermultiple HR solutionsthatintegratetheorganizationalneedsofourclientswiththeneedsoftheparticipantstheyserve.Justaswiththephysicalandmentalhealth,webelievethatfinancialhealthandsecurityisakeycomponenttooverallhealth.OurrenewedTELUSHealthstrategyputsallofourpartnersandcustomersatthecenterofeverythingwedobyfocusingonthetop marketsegmentsforhealthandwellbeingservices,retirement,benefitsandadministrationproductsandservices,andhealthcaretechnologysolutions.Byimprovingaperson'slifeandwellbeing—theywillbehappier,healthierandultimatelymoreengagedandproductiveatwork. Wehavebeenprovidingbenefitsadministrationservicessince1966andfullyautomatedbenefitsadministrationservicessince1991whenourplatformwasintroducedtothemarket.Withmorethan58yearsofexperience,thecompanyemploysapproximately10,000employeeswhoworkwithsome30,000clientorganizationsrangingfromhealthplans,smallbusinesses,largecorporations,associations,unions,andlocalandstategovernments.
80	Withinthis RFP categorytherem aybesubcategoriesofsolutions.	TELUSHealthofferssolutionsinallofthecategorieslistedintheRFP.Wehaveincludeddetaileddoverviewsofthesesolutionsinourresponsetoq.79above,andhaveincludedanattachmentofPDFsoutliningourservicesforSourcewellmemberstoreviewintheDocumentssection. *

	Listsubcategorytitlesthatbestdescribeyourproductsandservices.	

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
81	Category1:Wellnessengagementprogramsandplatforms	Yes No	TELUSHealthdeliverswellnessengagementprogramsthroughtheTELUSHealthOnewebandappplatform,whichprovidesaccesstoanintegratedmentalhealthandwellbeingecosystemspanningmental,physical,social,andfinancialpillars,includinghealthriskassessments,personalwellbeinggoals,digitalself-helpprograms,aself-servecontentlibrary,healthcoaching,challenges,activitytracking,gamification,socialnetworking,andrewardsandincentives. Todrivesustainedparticipation,TELUSHealthusesastrategiclaunchcampaign,anongoingintegratedcommunicationsstrategy(includingemailcommunications,promotionalgraphics,andshortpromotionalblurbsforSlack,GoogleChat,andcompanyintranets),twelve(12)monthsofconfigurablemonthlyprogramming,holisticwellbeingassets(challenges,educationalcontent,andpillar-basedresources),recommendedincentivization(includingsubsidizedincentivesincreasingengagementbyupto30%),andongoingwhite-glovesupportfromClientSuccess&EngagementManagerswhocontinuouslyoptimizetacticstoengagehistoricallyunengagedemployees. TELUSHealthalsodrivesongoingengagementthroughmonthlynewchallenges,consistentlyaddingnewlibrarycontent,personalizationusingamachinelearningenginetodelivertimelycontent/goals/notifications,robustcommunicationsandpushnotifications,leveragingEmployeeWellbeingChampionsandLeaders,andachievablerewardsandincentivesunlockedthroughouttheyear. TheplatformsupportssocialengagementviaSocialStreamsandCommunityGroups,enablingemployeestoconnectthroughpostsandphoto-sharing,joinorcreategroupsandcommunities(includingpre-populatedandclient/employee-createdgroups),andreceiveprogramcontentandupdatespostedbytheClientSuccess&EngagementManager;SocialStreamsaremonitoredbydigitalscannersthatquarantineoffensivelanguageorimages,andadministratorscanactviathe"Moderati

			on"sectionoftheadministrationportal. Rewardsaredesignedusingbehavioraleconomicsandenableemployeestoearnpointsthroughactivitiessuchassigningupforevents,participatinginchallenges,trackingactivities,andachievingclient-definedmilestones(e.g.,completingtheHRAorattendingabiometricscreening),withpointsunlockinglevelsand,ifapplicable,enablingredemptionintheRewardsStorefore-giftcards;customerswhoincluderewardsandincentivestypicallyexperiencea34%increaseinmonthlyengagementcomparedtothosewhodonot. TELUSHealthreportsNorthAmericanprogramimpactinsightsfroma2023analysisofitsWellbeinguserdatalake,includinga15%averageincreaseinphysicalactivitylevels12monthsafterinitialloginanda24%reductioninriskofdevelopingdiabetesandcardiovasculardisease12monthsafterregistering,withhighlyengagedusersreducingrisknearlytwiceasmuchaslightlyengagedusers;resultsweremeasuredprimarilyviawearabledeviceandHRAdata(dailystepcount,dailymoderateactivitylevels,andsleep). Implementationistypically8-10weeks(dependingoncustomization)andincludesplatformdesign,configurationofeligibilityintake,fundingandconfigurationoftherewardsprogram(ifapplicable),andgo-live,supportedbyaClientSuccess&EngagementManagerandengagementspecialists;TELUSHealthalsoprovidescommunicationsmaterials(playbooks,one-pagers,fliers,posters,anddigitalcommunicationplans)andsupportsrecruitingandtraininganetworkofemployeewellbeingchampions.
82	Category1:Biometricscreeningservicesandcoordination	Yes No	TELUSHealthWellbeingincludesbiometricscreeningsaspartofthesolution'savailablefeaturesandservices. Referralsareavailableforservicesandproviderssuchasonsitebiometricclinics,whichcanbedeliveredaspartofrequestscapturedandexecutedthroughaStatementofWork,withstandardratesapplyingforadditionalcustomizationoruniquerequirements. *
83	Category1:Wellnessincentivemanagement	Yes No	TELUSHealthWellbeingsupportswellnessincentivemanagementbyenablingemployeestoearnpointsforactionssuchassigningupforevents,participatinginchallenges,trackingactivities,andachievingdefinedmilestones(e.g.,completingtheHRAorattendingabiometricscreening). Theplatformcanimportandincentivizeoff-platformactivitiesandingestexternaldataviacsvuploadtoawardpoints/incentives,anditcanprovidereportingorsenddataidentifyingwhohasachievedthresholdstosupportthedeliveryofoff-platformrewards(e.g.,daysoff). Incentiveconfigurationscanbetailored,includingwhichbehaviorsearnpoints,thepointamountsthatunlocklevels,rewardtypes,andrewardfrequency. Redemptionmethodsincludesendingdatatofacilitate HSA/WSAorpayrolldeposits,premiumreductions,charitabledonations,raffleprizedraws,andanin-appRewardsStorewithe-giftcardsthatsupports50+globalcurrenciesandlocaloptionsfornumerouscountries. Usersreceiveawellbeingscoreuponcompletionof theHRA,whichcanbeupdatedthroughaconnectiontoawearableactivitytrackingdeviceorviamanualtrackinginput. TELUSHealthisdevelopingenhancementstoincentivesadministrationwithphasedfeatureavailabilitybeginninginQ12025andfullimplementationexpectedbyQ320 *

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			25.
84	Category1:Healthcoaching	Yes No	TELUSHealthcurrentlyprovides12,507coachingservicestoourcustomers. TELUSHealthhas6,976,522livescurrentlyeligibleforourcoachingprograms. OurcoachingservicesareavailableintheU.S.andCanada. Duringimplementation,wehelprecruit(ifneeded)andtrainWellbeingChampions;theyareinvitedtojumpstarttrainingsessions,givenearlyaccesstotheplatform,andprovidedaplaybookwithtips,tools,strategies,andcommunicationstodriveawarenessandexcitement. Oureducationalcontentandresourcesareflexibleandconfigurable,usingaproprietarycontentframeworkbasedontheCOM-Bmodelofbehaviorchange,withacustomizeduserexperiencepoweredbyaproprietarymachinelearning(ML)engine;clientscanalsoaddtheirowncontenttotheLibraryandmayworkwiththeTELUSHealthLearningteamtocreatecustommaterials.AccountManagersandWellbeingEngagementSpecialistsarenotnecessarilyrequiredtohavespecificeducationorcertifications,andweprioritizehiringemployeeswithahealtheducationbackgroundandpriorexperiencedeliveringhealthandwellbeingprogramsinacompanysetting.
85	Category1:Wellnessprogrammanagementandrelatedservices,suchasdataanalytics,predictivemodeling,wellnessprogrambranding,strategicplanning,andon-sitewellnesscentermanagement,butonlytotheextentthatsuchservicesarecomplementarytoaproposer's offeringofthesolutionsdescribedin73-76above.	Yes No	TELUSHealthprovideswellnessprogrammanagementthroughtheTELUSHealthWellbeingsolution,enablingemployeestoaccessservices,tools,programs,andresourcesviaadigitalappandwebplatform,includinghealthriskassessments,biometricscreenings,healthcoaching,wellbeingchallenges,activitytracking(self-reportandconnectedwearables/apps),gamification,socialnetworking,rewards&incentives,andaneventscalendar. ThesolutionincludespredictivemodellingviaaReal-TimeHRA,whichusesdatafromconnectedwearabledevicestoassesshowdailybehaviorsimpacthealthrisks. TELUSHealthalsosupportsongoingdataanalyticsandreportingthroughplannedreal-timedataanalyticsandenhancedreportingcapabilitiesformembersandemployers. ProgramdeliveryissupportedbyaWellbeingEngagementSpecialistincludedinprogramfeeswhoassistswithprogramcreationanddelivery,alongsideanimplementationapproachthatincludesplatformdesign,eligibilityintakeconfiguration,rewardsconfiguration(ifapplicable),go-livesupport,communicationsassets(e.g.,playbooks,one-pagers,fliers,posters,digitalcommunicationplans),andrecruitmentandtrainingofemployeewellbeingchampions. AdditionalcustomizationsorenhancementsoutsidestandardfeaturesorsupportmaybedeliveredthroughProfessionalServicesunderanexecutedStatementofWork,andreferralsareavailableforservices/providerssuchasonsitebiometricclinics,onlinehealthriskassessmenttools,rewardsproviders,andonsitefitnessinstructors.
86	Category2:OpenEnrollmentSupport	Yes No	TELUSHealth,webelievethatcommunicationshouldnotjusthappenbeforeandduringopenenrollment.Participantsshouldhavenaturalandeasytouchpointsthroughouttheyearsotheycanfeelbetteraboutheirbenefitsandthechoicestheymakefortheirfamily.Participanteducationshouldbeeasilyaccessiblebasedontheirpreferredmediumandlearningstyle.OurstandardHRbenefitsvideolibrary,whichdoesnotrequirecustomizationandareavailableinEnglishandSpanish,includesvideostoeducateandinformparticipantsaboutthecomponentsoftheclient'sbenefitprogramsuchas: •Benefittermsexplained •Medicareoverview •Medicalplans-HMOvs.PPO •PrescriptionDrugs-overviewandtipstolowercosts

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			•Flexiblespendingaccounts •HDHPwithHSA •QualifyinglifeeventsWealsocanpostadditionalvideosontheparticipantwebsite,including videosdevelopedbytheclientoranothervendor. Ourcommunicationsandchangemanagementpracticealsocanworkwiththeclienttto createvideosifdesired(additionalfeesapply.)Wecansupportmp4formatthatwillbehostedinthecloudandsubtitlesinVTTformat.Thevideoscanbeconfiguredtodisplayforspecificparticipantsforadefinedtimeperiod(e.g.,annualenrollment)etc.WithYouTubeandeasyonlineaccessthroughsmartphones,shortvideosareagreatwaytoreachandengageparticipantsinafun,dynamicway.Benefitslibrary:Wecreatefresh websitecontentanddesignwebportalsthatmeetourclients'specificneeds.Duringimplementationplanning,ourclientscompletearequirementsdocumentthatoutlinestheirgoalsandprogramdetailsincludingtimingforupdatessothatwebcontentcanbecraftedsuchaseducationalinformation,links,widgetsandaportalthatexceedstheirexpectations.Decisionsupport:Throughouttheenrollmentprocessoursystemsdefinestermsandexplainstherationalebehinddecisionsinapproachablelanguage/terms.Thismeansparticipantscanfeelmoreconfidentandsatisfiedwiththeirbenefitsenrollmentexperience.Weprovideanumberofscenariostohelpemployeesunderstandtheirfinancialburdenindifferentoutcomes(e.g.,healthyyear,minorinjury,etc.)andhowtheyarecompensatedbyrecommendedlinesofcoverage.Wealsoprovideeducationonwhatspecificplansandgeneralplantypesareintherecommendationoverview.Thiswillbeexpandedintheupcomingmonths. ExpandingintoOpenenrollmentspecificallyweconnectwiththeplanmembersviaMobileApplications,Websites,Chatbotsand/orourCustomerServiceRepresentatives.TheCustomerServiceRepresentativeshaveaccesstoacomprehensivesetoftoolsthroughtheadministratorportaltomonitorandfacilitateasmoothenrollment(OpenandLifeeventsection125)process: •Onlineadministrationtoolsallowauthorizedadministratorstoemulateaparticipant'sexperience,add,view,andupdateparticipantinformation,dependents,coverage,andbeneficiaries,aswellasviewhistoricalinformationandassociatedtransactions. •Administratorscandownloadfiles,uploadparticipantdatafromHR/payrollsystems,andcorrecterrors. •Theportalprovidesreal-timeinformationsuchasdaysleftinenrollment,pendingenrollments,enrollmentstatus,call/chat/webvolumes,andpremiumreports. •Anadministratorself-serviceportalenablesviewingofparticipantinformationandtransactions,includingcurrentenrollmentstatusandaudittrailsofactionsperformedbyparticipantsoradministrators. •Adhocreportingmodulesandbusinessintelligencedashboardsareavailabletomonitorkeymetricsandenrollmentstatusinrealtime. •Theplatformincludesworkflow-driventasklists,dashboards,andanalyticstohelpadministratorstracktasks,monitorworkflowstatus,turnaroundtimes,andparticipantengagementwiththetoolsandportals. •Administratorscancreateandschedulecustomizedonlinereports,extractoutputsinvariousformats,andaccessalibraryofpre-definedandparameterizedreports.Customreportscanalsobedevelopedasneeded. •Thesystemsupportsprocessautomationandconfigurableworkflowstoensureefficientandcompliantbenefitadministration.

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			•Ongoingtrainingresources,userguides,andphonesupportareprovidedtoensure administratorsareequippedtousethetoolseffectively.
87	Category2:HealthPlandecisionsupportincludingbutnotlimitedtovirtualplancomparisontools	Yes No	TELUSHealth,webelievethatcommunicationshouldnotjusthappenbeforeandduringopenenrollment.Participantsshouldhavenaturalandeasytouchpointsthroughouttheyearsotheycanfeelbetteraboutttheirbenefitsandthechoicestheymakefortheirfamily.Participanteducationshouldbeeasilyaccessiblebasedontheirpreferredmediumandlearningstyle.OurstandardHRbenefitsvideolibrary,whichdoesnotrequirecustomizationandareavailableinEnglishandSpanish,includesvideostoeducateandinformparticipantsaboutthecomponentsoftheclient'sbenefitprogramsuchas: •Benefittermsexplained •Medicareoverview •Medicalplans-HMOvs.PPO •PrescriptionDrugs-overviewandtipstolowercosts •Flexiblespendingaccounts •HDHPwithHSA •QualifyinglifeeventsWealsocanpostadditionalvideosontheparticipantwebsite,includingvideosdevelopedbytheclientoranothervendor. Ourcommunicationsandchangemanagementpracticealsocanworkwiththeclienttocreatevideosifdesired(additionalfeesapply.)Wecansupportmp4formatthatwillbehostedinthecloudandsubtitlesinVTTformat.Thevideoscanbeconfiguredtodisplayforspecificparticipantsforadefinedtimeperiod(e.g.,annualenrollment)etc.WithYouTubeandeasyonlineaccessthroughsmartphones,shortvideosareagreatwaytoreachandengageparticipantsinafun,dynamicway.Benefitslibrary:Wecreatefreshwebsitecontentanddesignwebportalsthatmeetourclients’specificneeds.Duringimplementationplanning,ourclientscompletearequirementsdocumentthatoutlinestheirgoalsandprogramdetailsincludingtimingforupdatessothatwebcontentcanbecraftedsuchaseducationalinformation,links,widgetsandaportalthatexceedstheirexpectations.Decisionsupport:Throughouttheenrollmentprocessoursystemsdefinestermsandexplainstherationalebehinddecisionsinapproachablelanguage/terms.Thismeansparticipantscanfeelmoreconfidentandsatisfiedwiththeirbenefitsenrollmentexperience.Weprovideanumberofscenariostohelpemployeesunderstandtheirfinancialburdenindifferentoutcomes(e.g.,healthyyear,minorinjury,etc.)andhowtheyarecompensatedbyrecommendedlinesofcoverage.Wealsoprovideeducationonwhatspecificplansandgeneralplantypesareintherecommendationoverview.Thiswillbeexpandedintheupcomingmonths. ExpandingintoOpenenrollmentspecificallyweconnectwiththeplanmembersviaMobileApplications,Websites,Chatbotsand/orourCustomerServiceRepresentatives.TheCustomerServiceRepresentativeshaveaccesstoacomprehensivesetoftoolsthroughtheadministratorportaltomonitorandfacilitateasmoothenrollment(OpenandLifeeventsection125)process: •Onlineadministrationtoolsallowauthorizedadministratorstoemulateaparticipant'sexperience,add,view,andupdateparticipantinformation,dependents,coverage,andbeneficiaries,aswellasviewhistoricalinformationandassociatedtransactions. •Administratorscandownloadfiles,uploadparticipantdatafromHR/payrollsystems,andcorrecterrors. •Theportalprovidesreal-timeinformationsuchasdaysleftinenrollment,pendingenrollments,enrollmentstatus,call/chat/webvolumes,andpremiumreports. •Anadministratorself-serviceportalenablesviewingofparticipantinformationandtransactions,includingcurrentenrollmentstatusandaudittrailsofactionsperformedbyparticipantsoradmini

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			strators. •Adhocreportingmodulesandbusinessintelligencedashboardsareavailabletomonitorkeymetricsandenrollmentstatusinrealtime. •Theplatformincludesworkflow-driventasklists,dashboards,andanalyticstohelpadministratorstracktasks,monitorworkflowstatus,turnaroundtimes,andparticipantengagementwiththetoolsandportals. •Administratorscancreateandschedulecustomizedonlinereports,extractoutputsinvariousformats,andaccessalibraryofpre-definedandparameterizedreports.Customreportscanalsobedevelopedasneeded. •Thesystemsupportsprocessautomationandconfigurableworkflowstoensureefficientandcompliantbenefitadministration. •Ongoingtrainingresources,userguides,andphonesupportareprovidedtoensureadministratorsareequippedtousethetoolseffectively.
8 8	Category2:EnrollmentTechnologyforhealthplansandotherbenefitenrollment	Yes No	TELUSHealth,webelievethatcommunicationshouldnotjusthappenbeforeandduringopenenrollment.Participantsshouldhavenaturalandeasytouchpointsthroughouttheyearsotheycanfeelbetteraboutheirbenefitsandthechoicestheymakefortheirfamily.Participanteducationshouldbeeasilyaccessiblebasedontheirpreferredmediumandlearningstyle.OurstandardHRbenefitsvideolibrary,whichdoesnotrequirecustomizationandareavailableinEnglishandSpanish,includesvideostoeducateandinformparticipantsaboutthecomponentsoftheclient'sbenefitprogramsuchas: •Benefittermsexplained •Medicareoverview •Medicalplans-HMOvs.PPO •PrescriptionDrugs-overviewandtipstolowercosts •Flexiblespendingaccounts •HDHPwithHSA •QualifyinglifeeventsWealsocanpostadditionalvideosontheparticipantwebsite,includingvideosdevelopedbytheclientoranothervendor. Ourcommunicationsandchangemanagementpracticealsocanworkwiththeclientttocreatevideosifdesired(additionalfeesapply.)Wecansupportmp4formatthatwillbehostedinthecloudandsubtitlesinVTTformat.Thevideoscanbeconfiguredtodisplayforspecificparticipantsforadefinedtimeperiod(e.g.,annualenrollment)etc.WithYouTubeandeasyonlineaccessthroughsmartphones,shortvideosareagreatwaytoreachandengageparticipantsinafun,dynamicway.Benefitslibrary:Wecreatefreshwebsitecontentanddesignwebportalsthatmeetourclients’specificneeds.Duringimplementationplanning,ourclientscompletearequirementsdocumentthatoutlinestheirgoalsandprogramdetailsincludingtimingforupdatessothatwebcontentcanbecraftedsuchaseducationalinformation,links,widgetsandaportalthatexceedstheirexpectations.Decisionsupport:Throughouttheenrollmentprocessoursystemsdefinestermsandexplainstherationalebehinddecisionsinapproachablelanguage/terms.Thismeansparticipantscanfeelmoreconfidentandsatisfiedwiththeirbenefitsenrollmentexperience.Weprovideanumberofscenariostohelpemployeesunderstandtheirfinancialburdenindifferentoutcomes(e.g.,healthyyear,minorinjury,etc.)andhowtheyarecompensatedbyrecommendedlinesofcoverage.Wealsoprovideeducationonwhatspecificplansandgeneralplantypesareintherecommendationoverview.Thiswillbeexpandedintheupcomingmonths. ExpandingintoOpenenrollmentspecificallyweconnectwiththeplanmembersviaMobileApplications,Websites,Chatbotsand/orourCustomerServiceRepresentatives.TheCustomerServiceRepresentativeshaveaccesstoacomprehensivesetofto

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			olsthroughtheadministratorportaltomonitorandfacilitateasmoothenrollment(OpenandLifeeventsection125)process: •Onlineadministrationtoolsallowauthorizedadministratorstoemulateaparticipant'sexperience,add,view,andupdateparticipantinformation,dependents,coverage,andbeneficiaries,aswellasviewhistoricalinformationandassociatedtransactions. •Administratorscandownloadfiles,uploadparticipantdatafromHR/payrollsystems,andcorrecterrors. •Theportalprovidesreal-timeinformationsuchasdaysleftinenrollment,pendingenrollments,enrollmentstatus,call/chat/webvolumes,andpremiumreports. •Anadministratorself-serviceportalenablesviewingofparticipantinformationandtransactions,includingcurrentenrollmentstatusandaudittrailsofactionsperformedbyparticipantsoradministrators. •Adhocreportingmodulesandbusinessintelligencedashboardsareavailabletomonitorkeymetricsandenrollmentstatusinrealtime. •Theplatformincludesworkflow-driventasklists,dashboards,andanalyticstohelpadministratorstracktasks,monitorworkflowstatus,turnaroundtimes,andparticipantengagementwiththetoolsandportals. •Administratorscancreateandschedulecustomizedonlinereports,extractoutputsinvariousformats,andaccessalibraryofpre-definedandparameterizedreports.Customreportscanalsobedevelopedasneeded. •Thesystemsupportsprocessautomationandconfigurableworkflowstoensureefficientandcompliantbenefitadministration. •Ongoingtrainingresources,userguides,andphonesupportareprovidedtoensureadministratorsareequippedtousethetoolseffectively.
89	Category2:OpenEnrollmentSupportandrelatedservices,butonlytotheextentthatsuchservicesarecomplementarytotheproposer’sofferingofthesolutionsdescribedin78-80above.	Yes No	TELUSHealth,webelievethatcommunicationshouldnotjusthappenbeforeandduringopenenrollment.Participantsshouldhavenaturalandeasytouchpointsthroughouttheyearsotheycanfeelbetteraboutttheirbenefitsandthechoicestheymakefortheirfamily.Participanteducationshouldbeeasilyaccessiblebasedontheirpreferredmediumandlearningstyle.OurstandardHRbenefitsvideolibrary,whichdoesnotrequirecustomizationandareavailableinEnglishandSpanish,includesvideostoeducateandinformparticipantsaboutthecomponentsoftheclient'sbenefitprogramsuchas: •Benefittermsexplained •Medicareoverview •Medicalplans-HMOvs.PPO •PrescriptionDrugs-overviewandtipstolowercosts •Flexiblespendingaccounts •HDHPwithHSA •QualifyinglifeeventsWealsocanpostadditionalvideosontheparticipantwebsite,includingvideosdevelopedbytheclientoranothervendor. Ourcommunicationsandchangemanagementpracticealsocanworkwiththeclientttocreatevideosifdesired(additionalfeesapply.)Wecansupportmp4formatthatwillbehostedinthecloudandsubtitlesinVTTformat.Thevideoscanbeconfiguredtodisplayforspecificparticipantsforadefinedtimeperiod(e.g.,annualenrollment)etc.WithYouTubeandeasyonlineaccessthroughsmartphones,shortvideosareagreatwaytoreachandengageparticipantsinafun,dynamicway.Benefitslibrary:Wecreatefreshwebsitecontentanddesignwebportalsthatmeetourclients’specificneeds.Duringimplementationplanning,ourclientscompletearequirementsdocumentthatoutlinestheirgoalsandprogramdetailsincludingtimingforupdatessothatwebcontentcanb

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			ecraftedsuchaseducationalinformation,links,widgetsandaportalthatexceedsthei rexpectations.Decisionsupport:Throughouttheenrollmentprocessoursystemsde finestermsandexplainstherationalebehinddecisionsinapproachablelanguage/ter ms.Thismeansparticipantscanfeelmoreconfidentandsatisfiedwiththeirbenefitse nrollmentexperience.Weprovideanumberofscenariostohelpemployeesunderstа ndtheirfinancialburdenindifferentoutcomes(e.g.,healthyyear,minorinjury,etc.)an dhowtheyarecompensatedbyrecommendedlinesofcoverage.Wealsoprovideedu cationonwhatspecificplansandgeneralplantypesareintherecommendationovervi ew.Thiswillbeexpandedintheupcomingmonths. ExpandingintoOpenenrollmentspecificallyweconnectwiththeplanmembersviaM obileApplications,Websites,Chatbotsand/orourCustomerServiceRepresentativ es.TheCustomerServiceRepresentativeshaveaccesstoacomprehensivesetofto olsthroughtheadministratorportaltomonitorandfacilitateasmoothenrollment(Ope nandLifeeventsection125)process: •Onlineadministrationtoolsallowauthorizedadministratorstoemulateaparticipant' sexperience,add,view,andupdateparticipantinformation,dependents,coverage, andbeneficiaries,aswellasviewhistoricalinformationandassociatedtransactions. •Administratorscandownloadfiles,uploadparticipantdatafromHR/payrollsystems ,andcorrecterrors. •Theportalprovidesreal- timeinformationsuchasdaysleftinenrollment,pendingenrollments,enrollmentstat us,call/chat/webvolumes,andpremiumreports. •Anadministratorself- serviceportalenablesviewingofparticipantinformationandtransactions,includingc urrentenrollmentstatusandaudittrailsofactionsperformedbyparticipantsoradmini strators. •Adhocreportingmodulesandbusinessintelligencedashboardsareavailabletomo nitorkeymetricsandenrollmentstatusinrealtime. •Theplatformincludesworkflow- driventasklists,dashboards,andanalyticstohelpadministratorstracktasks,monitor workflowstatus,turnaroundtimes,andparticipantengagementwiththetoolsandpor tals. •Administratorscancreateandschedulecustomizedonlinereports,extractoutputsi nvariousformats,andaccessalibraryofpre- definedandparameterizedreports.Customreportscanalsobedevelopedasneede d. •Thesystemsupportsprocessautomationandconfigurableworkflowstoensureeffi cientandcompliantbenefitadministration. •Ongoingtrainingresources,userguides,andphonesupportareprovidedtoensure administratorsareequippedtousethetoolseffectively.

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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 *
	(•) Yes ( ) 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."

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- Pricing - Sourcewell RFP 040226 - TELUS Health Price Proposal 3APR2026.pdf - Friday April 03, 2026 09:39:46
- Financial Strength and Stability - TELUS 2024 Annual Report.pdf - Wednesday April 01, 2026 17:22:31
- Marketing Plan/Samples - RBS Case Study - H&W admin.pptx - Wednesday April 01, 2026 17:14:29
- WMBE/MBE/SBE or Related Certificates - TELUS Supplier Diversity.pdf - Wednesday April 01, 2026 17:23:46
- Standard Transaction Document Samples - Wellbeing_Platform_Services_ORDER_FORM.docx - Wednesday April 01, 2026 17:21:38
- Requested Exceptions - Sourcewell RFP 040226 - TELUS Health Exceptions Table TH 6APR2026.pdf - Monday April 06, 2026 14:23:30
- Upload Additional Document - TELUS Health Program Details for Wellbeing, Health Ben Admin, Leave Disab and Pension Admin Services 3APR2026.pdf - Friday April 03, 2026 10:39:44

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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.

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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. - Bradley Fusco, Vice President, Retirement and Benefits Solutions , TELUS Health (US) Ltd.

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

○ **Yes** ◉ **No**

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

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

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