

SUCCESS BEGINS WITH A HEALTHY TEAM.

Health Management Services for
ABC Client

December 1, 2021
Quote valid for 90 days



PROPOSAL SUMMARY

STERLING WELLNESS SOLUTIONS



With our hands-on approach and innovative technology, Sterling Wellness Solutions creates comprehensive and effective wellness programs that focus on results. We take the work out of wellness. It's the Sterling Difference.

Our mission is reflected in the commitment, passion, and experience of our team. Wellness happens by choice, not by chance, and we believe employers must offer opportunities in the workplace to encourage healthy lifestyle decisions. In a time of escalating healthcare costs, Sterling Wellness Solutions helps employers create a plan for success that encourages employee engagement and continues influencing change long after the workday has ended. Our commitment to service and our goal to provide a professional and positive experience for every participant remains a part of our daily operations.



SHAPE FOUNDATION

Our experience building relationships with consultants, clients, and participants creates the foundation for successful programming that fosters a culture of wellness and impacts long-term health.



SPARK CHANGE

Our team of professionals is dedicated to motivating healthy, sustainable changes through pro-active engagement, targeted health coaching, fun quarterly challenges, meaningful interactive education, and innovative programming.



STRENGTHEN IMPACT

Our wholistic approach couples biometric and claims data for the most comprehensive look at your population. Our strategies are backed with trend reporting to measure performance and direct future initiatives that impact individuals as well as the bottom line.

ORGANIZATION INFORMATION

STERLING WELLNESS SOLUTIONS



President and owner, Claire Kelbaugh, started her career in the employee benefits industry. Her previous experience includes working for a large national risk and insurance services and solutions company. After years of seeing self-insured employers struggle to reduce the cost of health care claims, Claire saw an opportunity to make an impact on employers and employees through a proactive approach to healthcare. In 2001, Claire Kelbaugh founded Sterling Wellness Solutions with a mission to educate employers on the benefits of implementing workplace wellness programs. Today, we remain dedicated to reducing the costs of health care by educating employees and their dependents about how to manage their health risk factors and motivate positive change.

Sterling Wellness Solutions is currently impacting over 45,000 lives across 45+ different corporate partnerships. Our client list has included organizations from a wide variety of industries, with multiple locations throughout the U.S., ranging in size from 50-26,000 employees. This includes 15 government, 2 non-profit, and 3 independent school district client entities.

Our experience building relationships with consultants, clients, and participants ensures our team of professionals is ready to lay the groundwork for fostering a culture of worksite health and wellness with you. Alongside our Medical Director, our professionals include registered nurses, registered dietitians, certified phlebotomists, exercise physiologists, personal trainers, certified wellness experts and health coaches, with the support of a complete administrative staff and communications team. Our health coaches are degreed professionals with additional certifications in nationally recognized training programs based on research in the areas of health and fitness best-practices. Members of our team have certifications from WELCOA, National Wellness Institute, NSCA, ACSM, Cooper Institute, Catalyst Coaching Institute, Dr. Sears Wellness Institute, and more. Our commitment to service and our goal to provide a professional and positive experience for every participant remains a part of our daily operations.



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HIPAA COMPLIANCE

We place great emphasis on maintaining HIPAA compliance and confidentiality guidelines. All employees are required to take HIPAA training upon employment at Sterling Wellness Solutions, as well as an annual security training on updates and best practices. Health Park and Sterling's portal service provider Core Health align with industry best practices (NIST, etc) and is ISO 27001 certified. Any confidential information during consultations is sent using encrypted email or encrypted documents. Our staff has training and awareness to identify and flag data that is confidential in nature and take steps, such as encryption, to protect such data. Employers will never have access to individual screening or biometric results, health coaching records, or personal health profile. All information sent to an employer is deidentified and summarized in an aggregate reporting form to help identify the needs of a population. In the event that patient medical records are to be shared with the appropriate health partners, Sterling Wellness will have a business associate contract or other written agreement in place before protected health information is disclosed.

DISASTER RECOVERY AND SECURITY

Sterling Wellness has initiated a disaster recovery plan with objectives of minimizing interruptions, responding to emergencies, and providing rapid restoration of operations for our client partners. Our online Health Park portal is used to receive, store, and evaluate information which utilizes one of two offsite datacenters, in either Canada or USA. The backup retention policy is currently nightly for 30 days, weekly for 50 weeks, monthly for 24 months. If additional information is needed regarding the disaster recovery plan for our Health Park portal, please request the CoreHealth DRP TOC from us.

All data from corporate office desktop computers, laptop computers and wireless devices are saved to network servers, that are accessible remotely during emergencies. During disasters, Sterling Wellness employee job descriptions and roles determine the level of remote access to ePHI as appropriate to keep business processes continued with minimal disruption. In the case that the corporate office is inaccessible or experiencing a phone system outage, all phone lines are automatically forwarded to employee cell phones. If additional information is needed regarding the disaster recovery plan for our network server, internet or phone systems, please request our provider plans from Sterling Wellness.

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PROVEN RESULTS

A 12-year partnership with a road construction company has shifted their company culture and created a population focused on health. Through onsite education and targeted communications, the 550 employee and spouse group has significantly impacted claims costs, improved preventive care and reduced emergency room utilization. The teams across 35 different locations now begin every shift with guided stretching to reduce on the job injuries!

Through our multi-year strategic plan, this company is utilizing Sterling Wellness' Health Park Portal including interactive education, health challenges, social support, online coaching, and Health Assessment. Annual wellness screenings include onsite events and offsite vouchers with an expanded physician's lab panel. In addition to a full-time RN who visits worksites quarterly, telephonic lifestyle coaching and Care Plus chronic condition management are targeted based on biometrics coupled with claims connectivity and analytics. Incentive strategy and management; Account Management includes incentive strategy and management, regular meetings, detailed reporting and custom branded communications.

- 90% Employee & Spouse Engagement
- 80% Incentive Compliance
- 88% of targeted high-risk members were engaged with a health coach and/or nurse
- 82% of population engaged in preventive care visits
- 82% success rate for members engaged in Nicotine Cessation Program



57%
Reduction
in ER Visits

ENGAGEMENT ADMINISTRATION

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HEALTH SCREENINGS

Assessing the health of an organization is a great place to start. Our team of professionals can come to your worksite to conduct biometric testing and lab work. Our convenient onsite testing yields high employee participation rates, however offsite options are available too, creating access for remote employees or multiple smaller locations. We offer the most comprehensive wellness panel in the industry, along with optional testing based on the needs of your population.

SCREENING OPTIONS

- Blood Pressure
- Body Weight
- Waist Circumference
- Glucose (Blood Sugar)
- Lipid Panel
 - Total Cholesterol
 - Triglycerides
 - LDL (Bad Cholesterol)
 - HDL (Good Cholesterol)
 - TC/HDL Ratio
- Complete Blood Count
- Thyroid Panel
- Complete Metabolic Panel
 - Liver Function
 - Kidney Function
 - Electrolytes
- Cotinine (Nicotine)
- Hemoglobin A1C
- PSA

ABC CLIENT LOGO

2021 Wellness Program

Save up to \$2,400 on annual health insurance premiums!

Brighten
your well-being

Save up to \$2,400 on annual health insurance premiums!

Join the 2021 wellness program and help us make ABC Company a healthier, happier workplace!

Core Requirements

Nicotine Free

Champion Level

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ENGAGEMENT ADMINISTRATION

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INCENTIVE MANAGEMENT

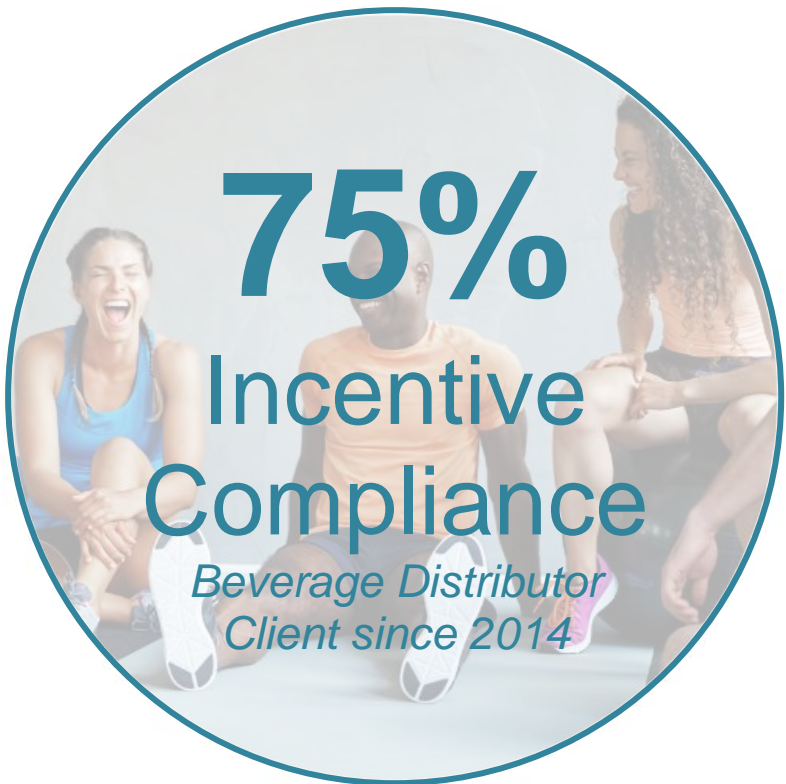
Sterling Wellness specializes in the design, tracking and management of wellness incentive programs. The key to a successful program is employee engagement. In our experience, incentives make the difference. Our client companies who use incentive programs have a 87% average engagement and 76% participation versus clients with no incentive who average 25% participation.

We partner with clients and their insurance consultants to create a multi-year strategy that gets results.

- Participation-based
- Outcomes-based
- Confidential Reporting

The Health Park system multiple trigger points for rewards:

- Automatic award based on action in system
- Coach/Administrative Award
- Validated Outcomes



PROGRAM MARKETING AND COMMUNICATIONS

Along with our program managers and medical staff, our in-house marketing and communications team is here to help inspire change and cultivate a culture of well-being.

Participant Engagement

- Program/Incentive Overview
- Health Screening Promotions
- Results Delivery
- Health Challenge Promotions
- Preventative Screening Campaigns
- E-Newsletter
- Monthly Health Awareness
- Deadline Reminders

Methods of Delivery

- Poster and Flyer Printables
- App Notifications
- Automated Calls
- Electronic Mail
- Direct Mail
- Text Messaging
- Social Media

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ACTIVITIES AND CHALLENGES

While inspiring commitment for change, interactive challenges can be launched on a monthly, quarterly, and/or annual basis with real-time administrative support. All are created in-house and can be customized to the client's needs and interests (naming, logos, maps, etc.) Whether you choose to launch team or individual challenges, Sterling Wellness offers a wide array of topics to encompass total well-being – physical activity, nutrition, hydration, financial wellness, emotional health, stress, flexibility, gratitude, weight management, goal setting, sleep, clean eating, positivity, core strength, blood pressure, acts of kindness, etc.

- Battle of the Bend
- Bootcamp Champs
- Choose to Lose
- Core Strength
- Dollars and Sense
- Eat Right for Life
- Get up and Go
- Health Hustle
- Healthy New You
- Hydration Nation
- Keep it Clean
- Make Your Move
- Mindfully Present
- Pound the Pavement
- Powering Past Stress
- Recharge
- Skip the Sweets
- The Home Stretch
- The Power of Positivity
- Trekkin' the Nation
- Unwind Your Mind
- WaterPalooza
- Weight Loss Wars
- Wellympics



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WEB-BASED TOOLS

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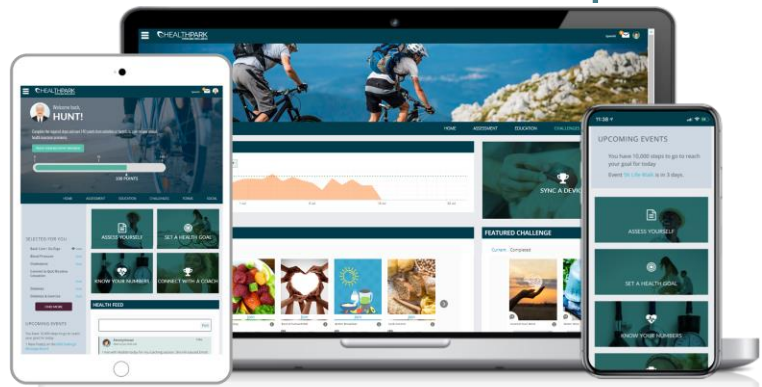
HEALTHPARK COMPREHENSIVE WELLNESS PROGRAMS

Health Park is Sterling Wellness Solutions branded, web-based health portal that drives wellness programming. We agree, completely web-based programs are not the answer. However, experience tells us that having a multi-faceted program that includes technology provides the best outcome.

Health Park modules are fully integrated allowing participants, coaches and program administrators to interact seamlessly. A flexible configuration allows for continual upgrades backed by the highest level of security for participants' personal health information. Our fully customizable portal can be branded to reflect your company or program name. The system also has the capability to integrate with third party applications and services including medical and drug claims, chronic condition management, kiosks, fitness trackers and apps.

PORTAL SERVICES

- Easy Access to Program Details and Incentive Standings
- Multi-Lingual Capabilities
- Customizable & Branding
- Full Mobile Capabilities
- Health Park App available for download on [iOS](#) and [Android](#)
- Connects to 40+ Fitness Devices & Apps
- Health Assessment
- Schedule and Review Test Results for Biometric Screenings
- Interactive Health Education
- Secure Communication with a Health Coach
- Video Coaching
- Group Coaching Forums called Health Huddles
- Health Challenges
- Leaderboards
- Event Calendar & Tracking
- Personal Trackers including Weight, BP and more!
- Step & Activity Tracker
- Social Networking Buddy System
- Comprehensive Reporting



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WEB-BASED TOOLS

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CUSTOMIZATION & BRANDING

- Company Name
- Logo & Branding
- Program Details
- Incentive Tiers
- Personalized Graphics
- Single Sign-on Integration



INCENTIVE MANAGEMENT

- Participation
- Health Outcomes
- Portal-Driven Activities
- Form Management
- Event Tracking
- Reasonable Alternatives
- Appeals



COMPREHENSIVE REPORTING

- Incentive and Engagement
- Coaching Activity
- Annual Aggregate Report
 - Lab & Biometric Data
 - Health Assessment
 - Cohort Trend Reporting
 - Individual Risk Movement



HEALTH ASSESSMENT

- English or Spanish
- Pre-Populated Lab Results
- Emotional Health Focus
- Risk-Driven Responses
- Drives Targeted Health Education



HEALTH EDUCATION

- Health Plan Literacy Quiz
- Interactive Videos
- Self-Guided eCourses
- Coach-Led Programs
- Video Conferencing



HEALTH CHALLENGES

- Team & Individual Design
- Focused on Client Needs
- Increase Healthy Behaviors
- Drives Participation
- Enrollment & Participation tracked by Sterling Wellness

HEALTH COACHING

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The support and guidance offered by our team of health coaches gives participants the tools and resources they need to make lasting change. We focus on small, sustainable changes that lead to long-term results. Confidential quarterly activity reports outline participation and program content.

LIFESTYLE COACHING AND GOAL SETTING

- Telephonic, online and video coaching options
- Pro-active outbound coaching calls target high-risk population based on biometric data
- Coaches take a positive, participant-driven approach
- Provides health education and goal setting based on participant input
- Coaches track goal progress and lifestyle change throughout the coaching process
- Secure communications and appointment scheduling through Health Park portal
- Initiative has greater impact on claims and ROI
- Inbound coaching calls available to full population
- Referrals to third-party client partner programs

85%
**Program
Engagement**
*Beverage Distributor
Client since 2014*

ONSITE HEALTH COACHING

- Designated health professional becomes a part of client company's culture
- Offers a high-touch and interactive approach to health coaching
- Achieves the greatest impact in regard to participant engagement, lifestyle change and ROI
- Frequency, duration, and type of visits are based on company demographics
 - Monthly, Bi-monthly, or Quarterly
 - Group Seminars
 - Individual Consultations
 - Blood Pressure Checks
 - Weight Management
 - General Health Education
- The Onsite Health Coach can also attend insurance meetings with consultants to review claims experience.
- Coordination of aggregate data with third-party providers including medical insurance, case management, etc., allows the Onsite Health Coach to target high claim areas and group-specific needs.

CHRONIC CONDITION PROGRAM

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Sterling Wellness' CarePlus Program is our high-touch initiative focused on improving management for members with chronic conditions and other cost drivers for the plan. Through claims connectivity and analytics, Sterling Wellness can identify and intervene to improve disease compliance, reduce the risk of complications, and provide long-term strategies for health management. Our experienced disease management team, including licensed registered nurses, advanced practice nurses, certified cardiac nurses, certified diabetes educators, nurse practitioners, registered dietitians and certified health coaches, can collaborate with participants and their providers to achieve success by:

- Establishing Participant Care Plans
- Defining Participant Health Goals
- Increasing Treatment Plan Compliance
- Reducing Unnecessary Hospital & ER Admissions
- Decreasing HEDIS Gaps in Care

HEALTHCARE LITERACY

We consistently engage with the entire population to build better healthcare consumers. The more a company's participants understand how to live healthy AND how to utilize their health benefits, the less money everyone spends. Our specialized clinical team can do this through building participant trust, consistent outreach, and interactive health education. Part of our on-going interactive health education includes discussion on:

- Health Plan Benefits
- Difference between visits to ER vs. Urgent Care
- Generic vs. Brand Prescriptions
- Mail Order Benefits
- Lifestyle Factors

40%
**Claims
Reduction**

*General Contractor & Construction
Management Firm
Client since 2014*

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CHRONIC CONDITION PROGRAM

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ANALYTICS AND REPORTING

With claims connectivity, Sterling Wellness Solutions can identify impact on areas such as:

- Emergency Room Visits
- Inpatient Hospital
- Outpatient Hospital
- Wellness vs Non-Wellness Participant Costs
- ROI based on National Medical and Prescription Drug Trend
- Disease Specific High Cost Claimants
- Generic Utilization
- Predictive Risk
- Care Gap Compliance
- Preventive Care Compliance

Medical & RX Per Member Per Month Cost vs. National Trend

