RESOLUTION AUTHORIZING AGREEMENT WITH WELLNESS COACHES USA, LLC FOR WELLNESS COACH SERVICES

WHEREAS, Since 2012, the Cleveland Public Library has utilized the services of a third party wellness services provider in connection with the Library’s point-based incentive program for determining employee health insurance costs; and

WHEREAS, Beginning in 2020, the Library will begin a new point-based incentive program where employees may earn up to three points each for: 1) certifying as tobacco free or participating in a smoking cessation program; 2) seeing their primary care physician for a wellness visit; and 3) participating in two wellness coaching sessions per year; and

WHEREAS, Wellness Coaches USA, LLC has proposed to provide wellness coach services for Cleveland Public Library employees at a rate of $58 per hour, which the Library estimates will amount to $4,000 per month, plus a $5,000 start-up fee and optional nutritional counseling at $64 per hour, for the initial one-year term of the agreement, which rate will increase by no more than 3% during the subsequent one-year renewal period; and

WHEREAS, Taylor Oswald LLC, the firm from which the Library desires to obtain its benefit consulting services, has agreed to contribute up to $70,000 from overrides to apply to the Library’s contract with Wellness Coaches USA, LLC if the Library engages Taylor Oswald to provide benefit consulting services; and

WHEREAS, The Library will be responsible to pay Wellness Coaches USA’s contract charges in excess of Taylor’s contribution, if any; now therefore be it

RESOLVED, That the Executive Director, CEO, or his designee, is hereby authorized to enter into an agreement with Wellness Coaches USA, LLC, subject to the approval of the Chief Legal Officer, for Wellness Coach Services for a period of January 1, 2020 through December 31, 2020, and to thereafter renew such agreement for an additional one-year term at a price increase not-to-exceed 3%, and to expend funds from General Fund No. 11510053-
53710 (Professional Services) to cover the Library’s portion, if any, of the cost of the contract with Wellness Coaches USA, LLC after Taylor Oswald’s contribution.
WELLNESS COACHES
SERVICE AGREEMENT

This Services Agreement (this “Agreement”), by and between Wellness Coaches USA, LLC, a Pennsylvania limited liability company (“Wellness Coaches”), and Cleveland Public Library (the “Company”), is entered into as of January 1, 2020.

In consideration of the respective agreements hereinafter set forth and the mutual benefits to be derived here from, Wellness Coaches and the Company, intending to be legally bound, hereby agree as follows:

1) Engagement of Wellness Coaches. The Company hereby engages Wellness Coaches to provide the health and injury prevention related services and products as such are set forth in Attachment A (the “Wellness Coaches Services”) and Wellness Coaches hereby accepts such engagement by the Company, all upon the terms and subject to the conditions hereinafter set forth.

2) Term; Termination. The initial term of this Agreement (Initial Term) is for the period beginning upon the date above and ending one year from the Start Date. The Start Date is the date upon which the Wellness Coaches Coach, referenced in Attachment A, begins his/her onsite responsibilities for Company. At the end of the Initial Term, and each successive term thereafter (Successive Terms) this Agreement will renew for an additional one (1) year period, upon written agreement of the parties unless a written 30 days’ notice is provided.

3) Personnel. Wellness Coaches shall provide Company with a dedicated Wellness Coach (Coach) to work an average of 16 hours per week, (or more depending upon Company’s need and the availability of Wellness coaches) at the Company’s locations (as set forth in Attachment A), beginning on the Start Date, to furnish the onsite services described in Attachment A. Wellness Coaches shall provide and devote to the performance of this Agreement such additional members, officers, and employees of Wellness Coaches as Wellness Coaches shall deem appropriate for the furnishing of the services as set forth in Attachment A.

4) Fees and Invoices. For the Initial Term hereof, Company agrees to pay Wellness Coaches (as further described in Attachment A) as follows; (a) a one-time startup fee of $5,000; and (b) a monthly based on the number of hours worked, which is estimated to be 16 hours a week @$58/hour or approximately $4,000 per month. Non MMO Nutritional Counseling and Web Portal and App to be billed as set forth in Attachment A, Section G. All fees are payable within thirty (30) days of receipt of the invoice date. If directed by the Company, Wellness Coaches will send all invoices to Taylor Oswald, Company’s benefits consultant, and will accept payments from Taylor Oswald on behalf of the Company.

To the extent that this Agreement is renewed as provided in Section 2 above, the fee payable to Wellness Coaches pursuant to the above will increase by no more than 3.0% over the amount payable during the immediately preceding term. Invoices provided to Company by Wellness Coaches will be reasonably detailed and will set forth the services provided, hours provided, and the fees related thereto. In the event of a dispute as to any portion of an invoice, the undisputed portion shall be paid by Company as provided herein and the parties shall negotiate in good faith the amount subject to dispute.
5) **Indemnification.** Wellness Coaches shall indemnify, defend and hold harmless Company, its affiliates and each of their respective officers, directors, employees, contractors, agents and representatives (the “Company Indemnities”) of and from any and all liabilities, damages, fines or expenses incurred by the Company Indemnities as a result of, or arising out of or relating to (a) any breach by Wellness Coaches of any representation, warranty, covenant, or terms and conditions of this Agreement, and (b) the negligence or intentional misconduct by Wellness Coaches, its employees, contractors and agents, except for those acts, errors and omissions that are due to the sole negligence of Company.

6) **Confidentiality.** Each of Wellness Coaches and the Company shall maintain in confidence, and shall use and disclose Confidential Information only as necessary for the performance of its rights and obligations under this Agreement. “Confidential Information” shall include, but not be limited to, information and records (whether written, electronic or oral) concerning those persons at the Company who receive Wellness coaching services, and information and records which relate to the business, affairs, customers, products, services, marketing plan, trade secrets, know-how or personnel of each party to this Agreement (whether marked as confidential or otherwise) and which is disclosed or acquired by one party to the other at any time whether before or after the date of this Agreement. Title and all rights to Confidential Information shall remain vested in the disclosing party. Confidential Information shall not include such information that is: (a) or becomes generally available to the public other than through a breach of this Section by a party thereto; (b) released by disclosing party to the general public without restriction; (c) independently developed or acquired by receiving party or its personnel without reliance in any way on other protected information of the disclosing party (provided the source of the information did not obtain the information illegally and had the right to disclose it); or (d) information approved by disclosing party for the use of, and disclosure to, the receiving party or its personnel without restriction. Notwithstanding the foregoing restrictions, the receiving party and its personnel may use and disclose any information (x) to the extent required by law or an order of any court or other governmental authority or (y) as necessary for it or them to protect their interest in this Agreement, but in each case only after the disclosing party has been so notified and, to the extent permissible by law, has had the opportunity, if possible, to obtain reasonable protection for such information in connection with such disclosure. Each party shall take all reasonable steps, including but not limited to those steps taken to protect that party’s Confidential Information, data or other tangible or intangible property that that party regards as proprietary or confidential and that is of similar value or importance to the information disclosed hereunder, to ensure that the information disclosed hereunder is not disclosed or duplicated for other’s use to prevent its officers and employees from violating this Agreement.

7) **Non-Solicitation.** Each party acknowledges and agrees that the other party has provided substantial training to and support for its employees, and that the loss of any of its employees would result in substantial monetary damages to such party. In consideration thereof, and except as otherwise agreed to by the parties, the each party agrees not to hire as an employee, or otherwise engage as an independent contractor or consultant, any employee of the other party that had contact with such party in connection with this Agreement for a period of one (1) year after termination of this Agreement.

8) **Wellness Coaches an Independent Contractor.** Wellness Coaches and the Company agree that Wellness Coaches shall perform services hereunder as an independent contractor, retaining control over and responsibility for its own operations and personnel. Neither Wellness Coaches nor its members, officers, or employees shall be considered employees or agents of the Company as a result of this Agreement nor shall any of them have authority to contract in the name of or bind the Company.

9) **Insurance.** Upon the execution of this Agreement. Company shall be named as an Additional Insured on Wellness Coaches Liability Insurance Policy for all work performed by Wellness Coaches pursuant to this Agreement. A copy of Wellness Coaches Certificate of Liability Insurance is
attached hereto as Attachment B. Wellness Coaches shall maintain the same insurance limits as depicted on Attachment B throughout the term of this Agreement, including any renewals.

10) Notices. All notices, claims, certificates, requests, demands and other communications hereunder shall be in writing and shall be deemed to have been duly given and delivered if (a) hand delivered, (b) sent by nationally-recognized overnight courier for next business day delivery, (c) sent by facsimile or (d) sent by registered or certified mail, postage prepaid, return receipt requested and addressed as set forth on the signature page hereto. Any such notice or communication shall be deemed to have been received (i) in the case of hand delivery, on the date of such delivery, (ii) in the case of nationally-recognized overnight courier, on the next business day after the date when sent, (iii) in the case of facsimile transmission, when received, and (iv) in the case of mailing, on the fifth Business Day following that on which the piece of mail containing such communication is posted. As used herein, “Business Day” means a day that is not a Saturday or Sunday.

11) No Waiver. No failure or delay by any party in exercising any right, power or remedy under this Agreement shall operate as a waiver thereof or of any other right, power or remedy. The waiver by any party hereto of a breach of any provision of this Agreement shall not operate or be construed as a waiver of any subsequent breach.

12) Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of Ohio, without giving effect to its conflicts of laws provisions.

13) No Third-Party Beneficiaries. Nothing in this Agreement is intended or shall be construed to give any person other than the parties hereto, their successors and permitted assigns, any legal or equitable right, remedy or claim under or in respect of this Agreement or any provision contained herein.

14) Entire Agreement. This Agreement and the Attachments hereto constitute the entire agreement between the parties with respect to the subject matter hereof and supersede all prior or contemporaneous negotiations, correspondence, understandings and agreements between the parties with respect thereto, whether oral or written. This Agreement may be amended only by an agreement in writing signed by both parties hereto.

15) Binding Effect; Assignment. This Agreement is personal in its nature and neither party hereto shall, without the consent of the other, assign or transfer this Agreement. The provisions of this Agreement shall be binding upon and inure to the benefit of the respective heirs, executors, administrators and successors and permitted assigns of the parties hereto.

16) Severability. The unenforceability or invalidity of any Section or Subsection or provision of this Agreement shall not affect the enforceability or validity of the balance of this Agreement. If any provision of this Agreement is so broad as to be unenforceable, such provision shall be interpreted to be only as broad as is enforceable.

17) Headings. The section headings contained in this Agreement are for reference purposes only and shall not affect in any way the meaning or interpretation of this Agreement.

18) Counterparts. This Agreement may be executed in any number of counterparts, and each such counterpart shall be deemed to be an original instrument, but all such counterparts together shall constitute one and the same agreement.
IN WITNESS WHEREOF, the parties hereto have executed this Services Agreement as of the date first written above.

WELLNESS COACHES

By: ________________________________
Rob Putnam
Chief Operating Officer

Date: ______________________________

Address:
725 Skippack Pike, Ste. 300
Blue Bell, PA 19422
Fax: (215) 628-3262

Cleveland Public Library

By: ________________________________

Name: ______________________________

Title: ______________________________

Date: ______________________________

Address: ______________________________

Telephone: ______________________________
Fax: ______________________________
ATTACHMENT A

Imagine what it would mean to you and your employees if you could help them ALL live healthier and safer lives. You can, and our onsite coaches will help you achieve this through the caring, genuine, customized, and personal connections they will make with your entire employee population.

We believe everyone would like to be and stay as healthy and injury free as possible. We also know that it is not easy for people to accomplish this on their own, and most will need one-on-one, professional help and support along the way. We are committed to partnering with you to provide that needed help and support by consistently engaging over 80% of your entire employee population in our onsite and technology supported coaching efforts to improve employee health and well-being.

Wellness Coaches is the largest and most experienced provider of onsite coaches. We have successfully replicated our outcomes with 100’s of employers over the past 15+ years. We currently service employers of all sizes (from small local employers to some of the largest companies in the world), in most business classifications and in over 35 states throughout the country. We are very pleased to present this proposal to CLEVELAND PUBLIC LIBRARY and would greatly appreciate the opportunity to partner with you next.

Section I: Scope of Work, Services and Pricing

A. Scope of Work

We understand that CLEVELAND PUBLIC LIBRARY may be interested in our Onsite Wellness Coaching services for your ≈500 employees working in Cleveland, OH. We propose to deploy our coach for ≈16 hours per week. We will work with you to further discuss your goals, objectives and any financial considerations prior to finalizing the number of hours your coach will be onsite. As part of our routine implementation process, and prior to our coach starting onsite, we will also work with you to finalize an Annual Service Delivery Plan (see D below), including goals, strategies, programs, materials, and events to target your areas of focus/need that are important to you. The plan will also include a schedule for the days and times (and shifts, if applicable) your coach will be onsite.

B. Onsite Wellness Coaching

Our services will be delivered by one of our professional, highly trained coaches we will embed right at CLEVELAND PUBLIC LIBRARY’s locations. Our wellness coach will go directly to employees, all of them, during regularly scheduled visits to, and rotating rounds throughout CLEVELAND PUBLIC LIBRARY’s locations to which they have been assigned. There, through frequent, ongoing and private personal, one-on-one, and face-to-face coaching interactions, our wellness coach will coach your
employees, each in accordance with their own needs, through the stages of change to sustained improvement in lifestyle behaviors and safety risks.

Onsite coaching interactions will be conducted in appropriate designated areas, and scheduled to accommodate all employees. Your coach will engage 80-90% of your employees annually, and conduct an average of between 30 and 35 employee coaching interactions for each 8 hour day of service. Topics discussed will include some combination of advice, counseling and coaching regarding; (1) wellness related lifestyle issues like nutrition and healthy eating, exercise, diet and weight loss, stress, blood pressure, smoking cessation, etc. and the chronic conditions such behaviors cause, (2) how to avoid, prevent, self-manage, and otherwise address the common musculoskeletal conditions or symptoms (work related or otherwise) that employees routinely suffer, but that so often impede their ability to perform their job and/or lead or progress to (or exacerbate) reportable injuries if not addressed, and (3) Mindfulness as it relates to overall focus and awareness recognition and situational awareness.

C. Other Onsite Coaching Services

While our Coaches are onsite, they are available to provide CLEVELAND PUBLIC LIBRARY with a wide range of customizable health and safety programs, events, presentations, etc. as part of our standard deliverables. Our Coaches will also actively promote, integrate and refer employees, when applicable, to all existing health and/or safety resources including those available through your insurance provider. Some examples of the types of services other customers are currently utilizing include:

Programs and Initiatives
- Onsite Coaching (on-demand)
- Wellness Coordinator Duties
- Blood Press Screenings
- Body Composition Testing
- Weight-loss Competitions
- Walking/Exercise Programs
- Tobacco Cessation Programs
- Corporate Challenges
- Vending Machine Evaluations
- Cafeteria Assessments
- Sleep Programs
- Health Fair Coordination
- Wellness Committee Leadership
- Promote and Coordinate Blood Testing

Group Programs, Workshops, Presentations, and Lunch & Learns on topics such as:
- Nutrition/Healthy Eating
- Stress Management
- Mindfulness
- Exercise/Fitness
- Weight Management
- Diabetes

Safety and Injury Prevention
- Stretch Programs
- Ergonomic Assessments
- CPR Training (AHA certified)
- Body Mechanics & Movements Programs
- Job Coaching
- Worker Readiness (Mindfulness) Training

D. Annual Service Delivery Plan

As part of our routine implementation process, and prior to our Coach starting onsite, we will also work with you to finalize a Service Delivery Plan. This will include the goals, strategies, programs, tools, resources, and events necessary to support the areas of focus and needs that are important to your organization. The plan will also include a schedule for the days and times (and shifts, if applicable) our Coach will be onsite. This turn-key process provides our customers with a unique experience that is turn-key and easy to implement.

As noted above, our Service Delivery Plans are customizable for each client. Topics, events, programs, and activities can be interchanged to better meet the needs of the organization’s calendar of events or support seasonal health/safety goals and objectives. Our Service Delivery Plans generally includes some combination
of focused health/safety one-on-one coaching, as well as group events, presentations, programs, etc. designed specifically for you.

Below is a sample of what a customized annual service calendar could look like. It includes a wide variety of coaching topics and group events. We will work with you to build a calendar that is responsive to your needs so that we can help you accomplish your goals and objectives.

<table>
<thead>
<tr>
<th>Wellness Coaching Focus</th>
<th>Group Event, Presentation, Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 1</td>
<td>Six Pillars of Health and Wellness Mindfulness</td>
</tr>
<tr>
<td>Month 2</td>
<td>Mindfulness</td>
</tr>
<tr>
<td>Month 3</td>
<td>Beverages and Hydration</td>
</tr>
<tr>
<td>Month 4</td>
<td>Physical Activity</td>
</tr>
<tr>
<td>Month 5</td>
<td>Resiliency</td>
</tr>
<tr>
<td>Month 6</td>
<td>Building a Healthy Habit</td>
</tr>
<tr>
<td>Month 7</td>
<td>Heart Health Scorecard</td>
</tr>
<tr>
<td>Month 8</td>
<td>Understanding Blood Sugar</td>
</tr>
<tr>
<td>Month 9</td>
<td>Healthy Meal Planning</td>
</tr>
<tr>
<td>Month 10</td>
<td>Fitness is Injury Prevention</td>
</tr>
<tr>
<td>Month 11</td>
<td>Stress Scorecard</td>
</tr>
<tr>
<td>Month 12</td>
<td>Healthy Holidays</td>
</tr>
</tbody>
</table>

E. Nutrition Counseling

To further distance ourselves from other providers, in addition to the utilization of Wellness Credits described above, we also offer all MMO customers the opportunity to have one of our in-network Registered Dietitians (RD) deployed onsite to provide Nutrition Counseling and other nutrition-related services. Employees covered under the MMO health plans are entitled up to 9 one-on-one sessions with our RD coach each year. As part of this deliverable, we offer to deploy one of our Registered Dietitians onsite at no cost to you and will bill the health plan only as the services are utilized by your employees. For those members not on MMO, we will bill you directly for those interactions. We will work with you to finalize the number of onsite hours as part of a further assessment of employer support, employee accessibility, and potential demand.

We are transforming the way Nutrition Counseling services are delivered. Today, employees seeking Nutrition Counseling, or other nutrition related services provided by RDs, must research in-network providers and schedule appointments at the RD’s office or clinic, making the services inconvenient and not easily accessible, resulting in very low utilization. By bringing our RDs to the workplace, employees will now have flexible and easily accessible access to these services, resulting in much higher utilization.

Our onsite RDs can help employees who need a complete diet overhaul or are looking to manage a more serious chronic condition such as: diabetes, pre-diabetes, obesity, overweight, heart disease, high blood pressure/cholesterol.
F. Optional Services

Web Portal

We also offer optional access to our health portal which allows employees, spouses and dependents to participate in web-based group challenges, track and sync health data from wearable devices, manage incentives, access health information and other resources, etc.

Key technology highlights include:

- **Online Wellness Programming** – Motivating “themed” health challenges covering a wide range of well-being topics, including; (1) promotional flyers and user instructions, (2) weekly health tips, (3) reports to track participation & individual outcomes through App or mobile web and (4) resource page to integrate important links and documents all in one place
- **Virtual Wellness Challenges** – Fun and interactive wellness challenges with virtual journeys; Online or web enabled for smart phones and tablets
- **Incentive Capabilities** – Ability to customize and configure incentive/reward programs
- **Device Aggregator** – Allows users to seamlessly sync most activity tracking devices and smartphone apps to their user account on the portal
• **Engaging Content & Video Learning Modules** – Broad array of relevant technology based content available to employees in downloadable and video form

• **Health Assessments & Well-Being Content Library** – Articles, posters, healthy recipes, health tips and clever clip video tips

• **Monthly Electronic Newsletter** – 4 page, professionally produced, newsletter covering a wide variety of relevant health related topics delivered electronically each month. Our standard newsletter is free, however, it can be customized to include client logo and content.

G. Pricing

**Onsite Wellness Coaching Services & Nutrition Counseling:**

- **Onsite Coaching Frequency**  
  16 hours per week

- **Start Up Fee (Coaching & Portal)**  
  $5,000

- **Hourly Coaching Fee**  
  $58 per hour

- **Non-MM0 Nutritional Counseling**  
  $64 per hour (billed in 30 minute increments)  
  Adding 5hrs/mth for 12mths = $3,900  
  OR  
  Adding 8hrs/mth for 12 months = $6,144

- **Web Portal & App**  
  $1.00 PEPM

**Note:** The hourly fee is for all services described in this proposal, and includes all recruiting, hiring, coach travel & management costs, reporting and/or data requests, as well as all ongoing coach related equipment and supply needs (i.e. laptop, BP & Body Comp machines, office supplies, cellular data devices, etc.). All program development and material design are also included in the hourly fee.

**Optional Services (Can be added at any time):**

- **Nutrition Counseling:**  
  These services are covered benefits under most health plans and are available at no out-of-pocket employer or employee costs. We can work with you and your consultants to determine what benefits are available to your employees. Nutrition Counseling is provided by our team of Registered Dietitians. We offer to bring one of our Registered Dietitians onsite to provide these services to your employees and will bill the health plan only as utilized by your employees.
Section II: Engagement, Outcomes and Account Management Support

A. Our Book of Business “Blueprint for Success”

1. Engage Employees
   Employee engagement is important, but it’s not enough. While 86% of employees did utilize our coaches, and we did coach them a lot, engagement is just the first step on the path towards success. We are just getting started!

2. Coach Employees a Lot!
   Our results show that the more often employees are coached, the more risks are improved. Thus, the more coaching the better.

3. Population Risk Reduction
   We coach employees often and reduce a ton of risk. This results in a substantial shift in the risk profile for the entire population. It is at this point employees can begin to move the needle.

4. Costs Will Follow Risks
   Once an employer combines high engagement with massive risk reduction, they can truly begin to bend the cost curve. And the coached population far outpaces those not coached.

---

**Our Report Covers**

- **1,000+** employer locations in 35 states
- **400,000** eligible employee lives
- **86%** or **342,000** employees coached
- **20** coaching interactions per employee
- Over **6.7 million** total onsite coaching interactions

---

**Medical & RX Claims PEPM**

- **$782** With Coaching
- **$1,148** No Coaching
B. A Word about Wellness Coaches

Wellness Coaches is the largest, most highly developed, and experienced national provider of onsite coaching and related services. Our mission is to help companies improve the health and safety of their employee populations by working one-on-one with their employees to achieve large-scale and lasting health and safety behavior improvements. The application of our onsite model, operating through our proprietary operational, training and delivery methodologies, engages more employees in coaching than ever before possible.

We presently provide our services to ≈500 employer locations in ≈35 states throughout the country. In addition, we service most business classifications (including manufacturing, transportation and distribution, hospital systems, municipal government, construction, pharma, financial services, technology, schools and professional services) and all sizes (from 50 lives to some of the largest companies in the world). Onsite coaching to improve employee health and safety is our business, and we do it very well.

Our delivery methodology is built upon direct, personal, one-on-one, and face-to-face human interaction, occurring right in the workplace. It is this transformation of injury prevention and wellness from the relatively remote and impersonal, to the human and very personal that makes our process so enticing, highly visible, conveniently accessible, and readily available. This makes it very natural and comfortable for employees to engage, in turn, driving our exceptional engagement levels and outcomes. Our coaches become the injury prevention and wellness “boots on the ground,” promoting and personifying safety and wellness values. We are listening, observing, discussing, teaching, testing, always serving as the convenient, responsive, and caring “go to source” for help and resources, and most importantly, coaching to help employees take and sustain action to improve their own safety and wellness behaviors, and their lives.

C. Employee Engagement

It is our very presence in the workplace, and the process and methodology that we have designed to physically capitalize upon and utilize our presence to stimulate engagement, which positions us to achieve higher levels of employee engagement than ever before possible.

First, our very presence in the workplace gives us a strong advantage and head-start in stimulating engagement. That’s because, first, the workplace is the only place where employees are truly available and accessible (in concentration), allowing us to reach out to them proactively and efficiently. Next, unlike telephonic and web-based coaching resources which are most often only “useable” during employees’ “off hours”, our wellness coaching is highly visible, convenient, and “on the clock”, making it readily available and painless for employees to engage.

Most significantly, we don’t just rely upon our presence in the workplace to stimulate high levels of engagement. Rather, we have designed our process to transform wellness from the remote and impersonal to the human, familiar and very personal; making it very natural and comfortable and convenient for employees to engage. We do so by to systematically “reaching out” to all employees; personally, and regularly interacting with them during rounds throughout the workplace. During these rounds we engage employees in the process of moving through the stages of change to coach supported “action” to improve lifestyle behaviors and health risk factors. We do so by developing personal and trusting relationships with them; educating and building their self-awareness; really getting to know them and what makes them tick; promoting health and wellness values; developing their interest in wellness and their readiness to improve.
D. Reporting

We will customize the content and timing of our reporting process to accommodate each organization’s specific reporting needs and objectives, as well as aggregate reporting needs for any groups or committees requiring such reports. However, we recommend reporting be provided no less than quarterly whenever possible. Our process presently includes our own proprietary software system (StageCoach™) to collect and track, daily, the content and outcome of all our coaching interactions, including employee participation statistics, subject or issue discussed interaction content, outcomes, and follow-up requirements. In addition, we track changes in health, musculoskeletal and safety risks as measured and observed by our Coaches. All of this data is used by our Coaches to help manage the individual employee coaching process, by our managers to manage and assess Coach and program performance, and assure quality, and by our account management staff for customer monitoring and reporting purposes, and in order to measure program effectiveness.

E. Account Management & Client Support

At Wellness Coaches we don’t just place staff onsite and hope for the best. All of our coaches are supported by a team of seasoned professionals at every level, all dedicated to assuring you receive the highest quality service possible. Below is what our Account Management and Support Team typically looks like:
ATTACHMENT B

Insurance Certificate Evidence
All Lines (next page)
# Certificate of Liability Insurance

## Coverages

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Occurrence Limits</th>
<th>Excess Limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial General Liability</td>
<td>Each Occurrence</td>
<td>Occur</td>
</tr>
<tr>
<td></td>
<td>Aggregate</td>
<td>Claims-Made</td>
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</tbody>
</table>

## Automobile Liability

<table>
<thead>
<tr>
<th>Type of Liability</th>
<th>Occurrence Limit</th>
<th>Excess Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Auto</td>
<td>Combined Single Limit (per accident)</td>
<td>Occur</td>
</tr>
<tr>
<td>All-Owned Autos</td>
<td>Bodily Injury (Per Person)</td>
<td>Claims-Made</td>
</tr>
<tr>
<td>Hired Autos</td>
<td>Bodily Injury (Per Person)</td>
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</tr>
<tr>
<td>Non-Owned Autos</td>
<td>Property Damage (Per Accident)</td>
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</table>

## Workers' Compensation and Employers' Liability

<table>
<thead>
<tr>
<th>Description of Operations</th>
<th>Premium Rate</th>
<th>Policy Limit</th>
</tr>
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<tbody>
<tr>
<td>76 WEG PK6265</td>
<td>$1,000,000</td>
<td>$1,000,000</td>
</tr>
</tbody>
</table>

## Certificate Holder

Wellness Coaches USA LLC
725 Skippack Pike
Suite 300
Blue Bell, PA 19422

Authorized Representative

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ACORD 25 (2016/03) 1 of 1

The ACORD name and logo are registered marks of ACORD
# ACORD Certificate of Liability Insurance

**Client:** Wellness Coaches USA LLC
**Address:** 725 Skippack Pike, Suite 300, Blue Bell, PA 19422

<table>
<thead>
<tr>
<th>Type of Insurance</th>
<th>Policy Number</th>
<th>Policy Effective</th>
<th>Policy Expiration</th>
<th>Limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Commercial General Liability</td>
<td>3SSBAIE3155</td>
<td>01/24/2019</td>
<td>01/24/2020</td>
<td>Each Occurrence: $2,000,000, Aggregate: $10,000,000</td>
</tr>
<tr>
<td>A Automobile Liability</td>
<td>3SSBAIE3155</td>
<td>01/24/2019</td>
<td>01/24/2020</td>
<td>Collision: $10,000,000, Bodily Injury: $2,000,000, Property Damage: $2,000,000, Aggregate: $5,000,000</td>
</tr>
<tr>
<td>A Umbrella Liability</td>
<td>3SSBAIE3155</td>
<td>01/24/2019</td>
<td>01/24/2020</td>
<td>Each Occurrence: $4,000,000, Aggregate: $4,000,000</td>
</tr>
</tbody>
</table>

**Description of Operations / Locations / Vehicles (ACORD 101, Additional Remarks Schedule, may be attached if more space is required):**

**Evidence of Coverage:**

**Certificate Holder:** Wellness Coaches USA LLC
**Address:** 725 Skippack Pike, Suite 300, Blue Bell, PA 19422

**Cancellation:** Should any of the above described policies become cancelled before the expiration date thereof, notice will be delivered in accordance with the policy provisions.

**Authorized Representative:** [Signature]

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ACORD 25 (2016/03)