ROCKFORD BOARD OF EDUCATION
REQUEST FOR PROPOSAL ON SUPPLIES, MATERIALS, EQUIPMENT OR SERVICES FOR ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205
ROCKFORD, ILLINOIS

RFP No. 18-5 Wellness Program Administrator

Date: January 4, 2018

OFFERS WILL BE RECEIVED UNTIL: 2:00 PM (CDST) on Monday, January 29, 2018

FOR SUPPLIES, MATERIALS, EQUIPMENT OR SERVICES SPECIFIED HEREIN. THE DATE AND THE TIME AS STATED IS ALSO THE TIME OF THE PUBLIC BID OPENING. IF YOU DESIRE TO SUBMIT A PROPOSAL, PLEASE DO SO ON THE FORMS PROVIDED AND RETURN TO THIS OFFICE.

Addressed to: BOARD OF EDUCATION
School District No. 205
501 Seventh Street, 6th Fl.
Rockford, Illinois 61104

GENERAL CONDITIONS AND INSTRUCTIONS FOR ALL PROPOSALS

The Board of Education (hereinafter occasionally referred to as Board or District as the context may require) reserves the right to reject any or all prices or bids submitted. One copy of this RFP is enclosed for your convenience.

a.) Please return a copy of the required forms AND an electronic PDF version of the proposal (including all required forms) on a CD or flash drive in a SEALED envelope with the bid number, subject and your firm’s name and address clearly indicated on the envelope. NOTE: FAXED and LATE proposal are not acceptable and will be rejected as non-responsive. Use of the included Bid Label is recommended.

b.) Proposals to be addressed as follows: Rockford Public School District Purchasing Department
501 Seventh St., 6th Floor
Rockford, IL 61104
Attn: Purchasing Department

The Board of Education reserves the right to return any merchandise for full price credit or replacement at the District’s discretion that does not comply with the conditions and specifications. The Board of Education reserves the right to increase or decrease quantities shown on bid.

The Board of Education reserves the right to cancel purchase orders if the delivery or completion is not performed in accordance with the bidding document and the date stated on the purchase order.

The Board of Education reserves the right to have any product analyzed at a laboratory to ascertain compliance with specifications. Expense of such testing shall be by the Board of Education unless such tests prove noncompliance with specifications at which time the expense shall be the responsibility of the Contractor.

Contract will be awarded to the company whose proposal is the best fit with the District and complies with these conditions and specifications. All rights are reserved by the Board of Education to select the proposal that in its judgment is in the best interest of the District and meets the needs or purposes intended. Such decisions shall be final and not subject to recourse.

The Bidder’s signature on the following page of this Form will be construed as acceptance of and willingness to comply with all provisions of the Acts of the General Assembly of the State of Illinois including, without limitation, laws rules and regulations relating to wages of laborers, and discrimination and intimidation of employees. This RFP and the resulting Contract are specifically subject to the Equal Employment Opportunity requirements of the Illinois Human Rights Act, Federal statutes and the policies and procedures of the District. Bidder agrees to comply in all respects with Federal, State, and local laws, ordinances and regulations pertaining to this RFP and to the performance of the Contract in the event the Bidder is awarded the contract. Provisions of applicable statutes enacted by governmental bodies having jurisdiction are hereby incorporated by reference as though fully set forth herein and became a part of this RFP and specifications.

Various statutes of the state of Illinois prohibit interest of School Board members in contracts and others prohibit interest of employees in contracts of the District as do District policies. Bidder by submitting a proposal agrees to refrain from entering into any contract with the District where a Board member or employee of the District has a prohibited interest.

18-15 Wellness Program Administrator 2
Complete, sign and return the following forms: General Conditions and Instructions for all Proposals, Bid-Rigging Certification, Minority and Women-Owned Business Concern Representation, Certificate Regarding Debarment, Suspension, Ineligibility and Exclusion, Certificate Regarding Lobbying, OFAC Compliance, Vendor Conflict of Interest Disclosure Form, and any other required submittals and certifications.

No proposals may be withdrawn after the official opening. All proposals submitted must be valid for a minimum period of sixty (60) days after the date set for the RFP opening. Please check the Terms and Conditions for any variation of this requirement.

All prices are F.O.B., Rockford, Illinois, which is further defined as meaning the price submitted in the proposal is the total price to this school district, including all freight and delivery charges. Under no circumstances may prepaid charges be added to the invoice.

A substitute item will be considered only if it is an item of regular manufacture as evidenced by literature, catalogs, etc. and not a pro-type or first article test item. Substitute or “as equal” items may be submitted with all supporting documents in advance of the bid due date for review and approval or rejection by the District. Such items are to be submitted to the Director of Purchasing for review. Permitted substitutions will be placed in an addendum to the RFP and issued by the District prior to the bid due date.

The successful Bidder must submit a separate invoice for each purchase order. The information on that invoice shall cover ONLY that one purchase order.

Any interested party, including all Bidders, may examine the RFP summary after proposals have been opened and awarded by the Board of Education. RFP summary will be available at the Board of Education Administration Building, Purchasing Department, 8:00 A.M., to 4:30 P.M., Monday through Friday. RFP recaps may also be reviewed by visiting www.DemandStar.Com.

Vendor’s signature on this RFP form must be an actual signature. A stamped, facsimile, or typed signature may disqualify the bid.

Please address all questions relative to any RFP in writing to the Purchasing Department, Director of Purchasing, Board of Education, 501 Seventh Street, Rockford, Illinois 61104 (via email to PurchasingDeptStaff@rps205.com). All request for information must be submitted at least five business days (Monday – Friday) prior to the RFP due date and time. Responses to questions will be reviewed by the Purchasing Department and if a response or clarification to the RFP is issued it will be issued via addendum to the bid and published on the District website and, if applicable, Demand Star. Any request for information submitted after the deadline will not receive a response. Under no circumstances may any bidder or its representative(s) contact any employee or representative of the Rockford Public Schools regarding this bid prior to the closing date, other than in writing to the Purchasing staff provided above. Any violation of this condition may result in a Vendor being considered non-compliant and ineligible for award.

**THIS SECTION BELOW MUST BE COMPLETED IN FULL AND SIGNED. FAILURE TO COMPLY MAY RESULT IN DISQUALIFICATION OF PROPOSAL.**

The undersigned hereby certifies that he/she has read and understands the contents of this solicitation and agrees to furnish at the prices shown any or all of the items and/or services, subject to all Instructions, Terms and Conditions, Specifications and attachments hereto. Failure to have read all the provisions of this solicitation shall not be cause to alter any resulting contract or request additional compensation.

**GENERAL CONDITIONS AND INSTRUCTIONS FOR ALL PROPOSALS FORM:**

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<tr>
<th>200 West Monroe St., Suite 1900</th>
<th>The Vitality Group, LLC</th>
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<tr>
<td>Address</td>
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<td>Chicago, Illinois 60606</td>
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<td>City &amp; State Zip</td>
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<td>Area Code Telephone Number</td>
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(Federal Employer Identification) Or Social Security Number (See Specifications for Determination)
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205
BID-RIGGING CERTIFICATION

I, ________________________________, a duly authorized (Agent)
agent of ________________________________, do hereby certify that (Contractor)
neither ________________________________ nor any individual (Contractor)
presently affiliated with ________________________________ has been barred from (Contractor)
bidding on a public contract as a result of a violation of either Section 33E-3 (bid-rigging) or Section 33E-4 (bid rotating) of the Illinois Criminal Code, contained in Chapter 750, Article 5 of the Illinois Compiled Statutes.

____________________________________
The Vitality Group, LLC
Contractor
MINORITY, WOMEN and DISABLED-OWNED BUSINESS CONCERN REPRESENTATION

Minority-Owned Business: a minority-owned business concern means a business concern that: (1) is at least 51 percent unconditionally owned by one or more individuals who are considered to be a member of a minority group, or a publicly owned business having at least 51 percent of its stock unconditionally owned by one or more members of a minority group; and (2) has its management and daily business controlled and operated by one or more such individuals. Individuals who certify that they are members of minority groups (African Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Asian-Indian Americans, and other minorities) are to be considered minority-owned enterprises.

Women-Owned Business: a business that is at least 51 percent owned by a woman or women who also control and operate it.

Disabled Owned Business: a business that is at least 51 percent owned by a person or persons with severe physical or mental disabilities which substantially limits one or more of the person’s major life activities and which person or persons control and operate such business.

“Control” in this referenced context means exercising the power to make policy decisions. “Operate” means being actively involved in the day-to-day management of the business.

The District shall rely on written representations of concerns regarding their status as minority/women/disabled-owned businesses. Offeror agrees to submit information regarding the minority ownership of its subcontractors on request of District.

COMPLETE THE SECTION BELOW AND RETURN THIS FORM WITH BID. FAILURE TO DO SO MAY RENDER THE OFFEROR’S BID UNACCEPTABLE.

A. Representation. The offeror represents that it is (  ) a minority-owned business concern. (  ) a women-owned business concern. (  ) a disabled-owned business concern.

B. Representation. The offeror represents that it is (  ) a minority-owned business concern. (  ) a women-owned business concern. (  ) a disabled-owned business concern.

C. Representation. The offeror represents that it is (  ) a minority-owned business concern. (  ) a women-owned business concern. (  ) a disabled-owned business concern.

Please Check Appropriate Box/Boxes

☐ African American (AFRAM) ☐ Caucasians (CAUC) ☐ Native American (NAAM)

☐ Hispanic American (HISP) ☐ Asian-Pacific American (ASIAP) ☐ Asian Indian (ASIAI) American

☐ Other, please identify: ____________________________________ ☐ Woman Owned (W) ☐ Disabled Owned (D)

The offeror has ☐/has not ☐ used the following procedures in searching for and obtaining suppliers and subcontractors:
- Place Minority-Owned Businesses on solicitation lists.
- Ensure that Minority-Owned are solicited whenever they are potential sources.
- Consider contracting with consortia of Minority-Owned Businesses when an intended contract is too large for any one such firm to handle on its own or, if economically feasible, divide larger requirements into smaller transactions for which such organizations might compete.
- Make information on contracting opportunities available and establish delivery schedules that encourage participation by Minority-Owned Businesses.
- Use the services and assistance of the SBA and Department of Commerce Minority Business Development Agency, as appropriate.

Company Name _________________________________ The Vitality Group, LLC

Address ______________________________________ 200 West Monroe St., Suite 1900

City _________________________________ State Illinois Zip 60606

Phone # 312-224-7100 Fax # 312-224-7101 FEIN # __________

Signature of Company Official __________________________ Title General Counsel

Date ____________________________
ILLENOIS STATE BOARD OF EDUCATION  
100 North First Street  
Springfield, IL 62777-0001

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY, AND VOLUNTARY EXCLUSION LOWER TIER COVERED TRANSACTIONS

This certification is required by the regulations implementing Executive Orders 12549 and 12689, Debarment and Suspension, 2 CFR part 3485, including Subpart C Responsibilities of Participants Regarding Transactions (also see federal guidance at 2 CFR part 180). Copies of the regulations may be obtained by contacting the Illinois State Board of Education.

BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS BELOW.

CERTIFICATION

The prospective lower tier participant certifies, by submission of this Certification, that:

1. Neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;

2. It will provide immediate written notice to whom this Certification is submitted if at any time the prospective lower tier participant learns its certification was erroneous when submitted or has become erroneous by reason of changed circumstances;

3. It shall not knowingly enter any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated;

4. It will include the clause titled Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion—Lower Tier Covered Transactions, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions;

5. The certifications herein are a material representation of fact upon which reliance was placed when this transaction was entered into; and

6. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this Certification.

The Vitality Group, LLC  
Organization Name

Lauren Chana  
Name of Authorized Representative

PR/Award Number or Project Name

General Counsel  
Title

January 23, 2018  
Date

Instructions for Certification

1. By signing and submitting this Certification, the prospective lower tier participant is providing the certifications set out herein.

2. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal government, the department or agency with which this transaction originated may pursue all available remedies, including suspension and/or debarment.

3. Except for transactions authorized under paragraph 3 above, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal government, the department or agency with which this transaction originated may pursue all available remedies, including suspension and/or debarment.

4. The terms covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded, as used herein, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549 and Executive Order 12689. You may contact the person to which this Certification is submitted for assistance in obtaining a copy of those regulations.

5. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the “GSA Government-Wide System for Award Management Exclusions” (SAM Exclusions) at http://www.sam.gov.

6. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required herein. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
CERTIFICATE REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit ISBE 85-37, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

The Vitality Group, LLC
Organization Name

Lauren Chana
Name of Authorized Representative

PR/Award Number or Project Name

General Counsel
Title

January 23, 2018
Date
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205

OFAC Compliance

BID/RFP No.: 18-15 Wellness Program Administrator

The undersigned hereby certifies and represents that products and/or services provided under any contract with the Rockford Public Schools resulting from this bid shall be in compliance with economic or trade sanctions or restrictions implemented by the United States government such as those administered by the Office of Foreign Assets Control ("OFAC") of the U.S. Department of the Treasury and shall not utilize or engage, for performance of any activities related to the products and/or services, any persons or entities that, (i) appear on OFAC's Specially Designated Nationals and Blocked Persons List ("SDN List"), as that list may be updated from time to time or any other similar list maintained by OFAC; (ii) are owned or controlled by any person or entities appearing on OFAC's SDN List, as that list may be updated from time to time or any other similar list maintained by OFAC; or (iii) are located in any country subject to U.S. economic or trade sanctions, such as those administered by OFAC.

The Vitality Group, LLC
Organization Name

Lauren Chana
Name of Authorized Representative

General Counsel
Title

Original Signature of Authorized Representative

January 23, 2018
Date
DISCLOSURE STATEMENT:
All businesses ("Vendors" or "Vendor" or "Vendor's") that wish to conduct business with the Rockford Public Schools "RPS" must complete this form. Please note that all contracts with RPS are subject to RPS Code of Ethics which prohibits RPS employees and Board of Education members from having certain relationships with persons or entities conducting (or proposing to conduct) business with RPS and which limits the acceptance of gifts from Vendors. The entire Board Member Conflict of Interest Board Policy 2.100 and Board Policy 5.120 may be viewed at http://www2.rps205.com/District/BOE/Pages/GP-200.aspx. The Code and its definitions are incorporated by reference into this Disclosure Form. If a Vendor has a disclosable relationship, the Vendor should assume the relationship may pose a conflict of interest until notified to the contrary in writing by a RPS administrative staff member authorized to confirm that a determination has been made that a conflict does not exist. A principle of the Code of Ethics is to ensure that relationships do not influence any official decision or judgment of RPS employees or Board of Education members. Accordingly, disclosure also should be made for any person connected with Vendor (e.g., officer, director, partner, shareholder, employee,) that is likely to: (i) materially contribute to Vendor's preparation, drafting, or presentation of a proposal or bid for services and/or supplies, (ii) materially contribute to Vendor's negotiation of a contract with RPS, or (iii) perform material services under a contract with RPS. Below, these persons are referred to as "Disclosable Persons."

CERTIFICATION:
I hereby certify that, except as disclosed below, to Vendor's knowledge, there is no conflict of interest involving the Vendor named below that would violate the RPS Code of Ethics, including that: (a) after inquiry, neither Vendor nor any Disclosable Person is involved or engaged in any private business venture or enterprise, directly or indirectly, with any RPS employee or Board of Education member or his or her family member; (b) no RPS employee or Board member or his or her family member owns or has a material personal financial interest (directly or indirectly) in Vendor or is engaged in a material personal business transaction with Vendor; and (c) no RPS employee or board of Education member or his or her family is employed by Vendor.

I further certify that neither the Vendor nor anyone acting on its behalf has requested that any RPS employee or RPS Board of Education member exert any influence to secure the award of this bid to the Vendor. Furthermore, no RPS Board of Education member, employee or agent has offered to influence to secure the award of this bid to the Vendor.

VENDOR INFORMATION:
Vendor Name: The Vitality Group, LLC

Vendor Address: 200 West Monroe St., Suite 1900
Chicago, Illinois 60606

Vendor Phone Number (312) 224-7100

Vendor Email: salesoperations@thepitalitygroup.com

Vendor FEIN: [Redacted]
DISCLOSURE STATEMENT:

I BELIEVE THE VENDOR NAMED ABOVE DOES have a potential conflict(s) of interest with a current RPS employee(s), or RPS Board of Education member(s).

☐ YES, the above statement is true.

☒ NO, the above statement is NOT true.

If you checked “YES” above, please provide the following information:

List all the Name(s) of RPS employee(s), RPS Board of Education member(s), or RPS employees’ or RPS Board of Education’s family member(s) with whom there may be a conflict of interest:

1. 

2. 

3. 

Provide a brief description of the nature of the potential conflict(s) of interest:

SIGNATURE:
By my signature below, I certify that I am the Authorized Representative of the VENDOR named above and that all of the information provided above by signor is true and complete to the best of the signor’s knowledge:

Lauren Chana
Print the Name of the Vendor’s Authorized Representative

General Counsel
Print the Position Title of the Vendor’s Authorized Representative

January 23, 2018
Date
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205

BIDDER'S CERTIFICATIONS

NON-COLLUSION AFFIDAVIT
The undersigned Bidder certifies that it has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by Bidder, entered into any combination, collusion, or agreement with any person relative to the price to be bid by anyone at such letting, nor to prevent any person from bidding, nor to induce anyone to refrain from bidding, and this Bid is made without reference to any other bid and without any agreement, understanding, or combination with any other person in reference to such bidding.

The undersigned Bidder further states that no person, firm, or corporation has, or will receive directly or indirectly, any rebate, fee, gift, commission, or thing of value based upon awarding of the Contract.

The Vitality Group, LLC
Name of Bidder (Please Print) 1/25/18

EQUAL OPPORTUNITY
The undersigned hereby certifies that Bidder is in compliance with the Equal Employment Opportunity Clause and the Illinois Fair Employment Practices Act.

The Vitality Group, LLC
Name of Bidder (Please Print) 1/25/18

SEXUAL HARRASSMENT
The undersigned hereby certifies that Bidder has complied and will comply with the requirement of Section 2-105 of the Illinois Human Rights Act (775 ILCS 5/2-105) with respect to sexual harassment policies. The terms of that law, as applicable, are hereby incorporated into the Contract.

The Vitality Group, LLC
Name of Bidder (Please Print) 1/25/18

NO SMOKING/NO TOBACCO
District are smoke free facilities. Bidder agrees that it and its employees will abide by the District's no smoking/no tobacco use policy (including snuff, electronic cigarettes and e-cigarette products) at all times while on District grounds.

The Vitality Group, LLC
Name of Bidder (Please Print) 1/25/18

DRUG FREE WORKPLACE
Each Bidder, if having twenty-five employees or more, does hereby certify, pursuant to Section 3 of the Illinois Drug-Free Workplace Act (30 ILCS 580/3), that it shall provide a drug-free workplace for all employees engaged in the performance of services under the Contract by complying with the requirements of the Illinois Drug-Free Workplace Act, and further certifies that it is not ineligible for award of this Contract by reason of debarment for a violation of the Illinois Drug-Free Workplace Act.

The Vitality Group, LLC
Name of Bidder (Please Print) 1/25/18
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205

BIDDER’S CERTIFICATIONS

GENERAL BIDDING CERTIFICATIONS
The undersigned further certifies that:

1. Bidder has read, understands, and agrees that the District’s acceptance of Bidder’s offer by issuance of an award will create a binding Contract; subject to any District requirement for a formal written contract.

2. The undersigned is an authorized agent of Bidder, and is expressly authorized to execute this Certification on Bidder’s behalf, to bind Bidder to the terms and conditions contained in this Bid Package, and to execute the Contract immediately upon notification by the District in the event Bidder’s Bid is successful and Bidder is selected by the District to perform the Contract.

3. Bid submission is in compliance with Illinois Compiled Statutes 105 ILCS 5/10-20.21 - Contracts, and 105 ILCS 5/10-22.34c, Third Party Non-instructional Services

4. Bidder is the following type of business entity, in good standing with the State of Illinois:
   - Limited Liability Company
   Bidder is qualified to conduct business in the State of Illinois and is in good standing.

5. Bidder confirms it operates in compliance with HIPAA, FERPA and all other legal requirements.

6. Bidder has and will at all times fully comply with the requirements of 105 ILCS 5/10-20.21(b) pertaining to the Illinois Use Tax Act.

7. All figures and responses submitted on this Bid Form are true, complete, and accurate. All documents attached to and submitted with this Bid Form are true, complete, and authentic.

8. Bidder’s current financial statement is attached, which has been certified by a Certified Public Accountant or is authenticated by Bidders signature on this form as true, complete and accurate.

9. Bidder hereby offers and agrees to furnish the services and equipment specified in this Bid Package, during the term specified in the Bid Package, at the rates stated in the bid, and subject to the attached General Instructions, General Terms and Conditions, Supplemental Terms and Conditions, Specifications, and the other requirements of the Bid Package, including Addenda, if any.

10. This Bid is firm and irrevocable for a period of sixty (60) days after Bid Opening, as detailed in the attached Instructions for Bidders.

The Vitality Group, LLC
Name of Bidder (Please Print)

(Handwritten Name and Signature)
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205

CERTIFIED CLEARED EMPLOYEE LIST*

The undersigned, a vendor, supplier, professional services firm or contractor, hereby certifies under oath as follows:

1- a criminal history records check, a Statewide Sex Offender Database check and a Statewide Child Murderer and Violent Offender Against Youth Database check has been conducted for all employees as indicated by a check mark in the appropriate box in accordance with 105 ILCS 5/10-21.9 (the Act); and

2- that such employees have not been convicted of any of the enumerated criminal or drug offenses listed in the Act and their name does not appear on the noted Databases; and

3- the undersigned is an owner (if sole proprietor) or officer, member or partner of the undersigned authorized to execute this document binding the undersigned.

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<th>NO.</th>
<th>LAST NAME</th>
<th>M.I.</th>
<th>FIRST NAME</th>
<th>CRIMINAL HISTORY</th>
<th>DATABASES</th>
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By: ________________________________

This certificate Subscribed and Sworn to before me this ___ day of ______________, 20__.

______________________________
Notary Public
Commission Expires: ______________

Vendor Cert. Employee List No. __________

* X check if not applicable. See Supplemental Terms and Conditions section 36.

From Vitality: The District's Account Manager is the person who would come onsite for member education sessions during launch and as additional onsite assistance is needed. However, Account Managers are assigned at the start of the implementation process after thoroughly understanding the needs of the client and specific program initiatives they would like to focus on. Therefore, we commit that we will complete this form once we are awarded the contact and the Account Manager is assigned.
ROCKFORD PUBLIC SCHOOL DISTRICT NO. 205

HOLD HARMLESS AGREEMENT

The Board shall not be responsible for the acts or omissions of any Bidder and the Bidder’s employees. The term Board and District, for purposes of this Agreement, shall mean and include the Board of Education and Rockford School District No. 205 Winnebago and Boone Counties, Illinois. The undersigned Bidder agrees to defend, hold harmless and indemnify the Board of Education and every Board member, officer, agent, attorney, servant or employee of the Board from any lawsuit, action, proceeding, liability, judgment, claim, or demand which may arise out of:

a) Any injury to person or damage to property sustained by Bidder, its officers, agents, servants or employees or by any person, firm, or corporation employed directly or indirectly by them upon or in connection with their performance or failure to perform under any bid contract with the Board, except for such injury or damage wherein it is finally determined that the Board, its board members, officers, agents, attorneys, servants or employees were grossly negligent or committed willful misconduct;

b) Any injury to person or damage to property sustained by any person, firm, or corporation, caused by any negligent or intentional act, default, error or omission of Bidder, its officers, agents, representatives, servants, or employees or of any person, firm, or corporation, directly or indirectly employed by them upon or in connection with performance under any bid contract between Bidder and the Board;

c) Fines, penalties, costs and expenses which may be incurred by or levied and assessed against the Board, or any board member, officer, agent, attorney, servant or employee of the Board in connection with Bidder’s performance or failure to perform under any bid contract with the Board.

Bidder at its own expense and risk shall defend any legal proceedings that may be brought against the Board, or any Board member, officer, agent, attorney, servant, or employee of the Board on any such claim or demand, and shall satisfy any judgment, fine or penalty which may be rendered or assessed against the Board, its Board member(s), or any officer, agent, attorney, servant, or employee of the Board arising out of any such claim or demand. The Board has and reserves the right to disapprove any attorney or law firm selected by Bidder to defend any such legal proceeding and to select an attorney or law firm to defend any such legal proceeding. The Board shall have the right to set off against any sums due Bidder under any bid contract with the Board the amount of any indemnity cost, expense and claim under this Agreement.

This indemnification, defense and hold harmless agreement shall apply to any lawsuit, action, proceeding, liability, judgment, claim or demand, of whatever name or nature, arising from or relating to acts or omissions of Bidder and/or its employees or agents with regard to the personnel, services, materials and goods provided to the Board by Bidder under any bid contract with the Board, notwithstanding that Bidder may deem the same to be frivolous or without merit. It is intended that this indemnity be interpreted in the broadest manner possible so as to insulate all of the entities, parties and individuals named above from any liability, cost or judgment, monetary or otherwise, as the same may relate to the personnel, services, material and goods provided to the Board under any bid contract with Bidder; provided however, this indemnification, defense, and hold harmless agreement shall not apply to any lawsuit, action, proceeding, liability, judgment, claim, demand, fine or penalty to the extent and wherein it is finally determined that the Board, its Board members, officers, agents, servants or employees were grossly negligent or committed willful misconduct which caused damage.

The provisions of this Hold Harmless Agreement shall survive termination of any bid contract with the Board.

Bidder: The Vitality Group, LLC

Lauren Chana
Print Name of Bidder’s Authorized Representative

General Counsel
Print Title of Bidder’s Authorized Representative

1/25/18
Date

This Agreement Subscribed and Sworn to before me this 25th day of January, 2018.

Notary Public
Commission Expires: 07/13/2020

18-15 Wellness Program Administrator: 13
IRS regulations require our School District to have on file appropriate taxpayer identification data concerning you or your firm. This information consists of either a Federal Employer Identification Number (F.E.IN) or Social Security Number (S.S.N.) and will have their payments reported to the IRS on form #1099-Misc.

Below is the legal name and address for you or your firm as shown on our official records. Please make any necessary corrections. Space is also provided to enter the appropriate tax identification number and to indicate (by checking a box) the correct legal status. Failure to complete and return this form could result in a $50,000 IRS penalty. In addition, we would be required to withhold 20% of payments due and remit this amount to the IRS until we receive the correct tax data.

For your convenience we request you fax this form back to sender (or to Purchasing at 815-966-3088). Please do this today so we can both fulfill our reporting obligations and ensure prompt payments.

Reminder: If LEGAL STATUS is “Sole Proprietorship”, the Taxpayer Identification Number must be either the Social Security Number of the owner or assigned FEIN.

LEGAL STATUS: (Check One)

[X] Corporation

☐ Limited

☐ Partner(ship) _______________ (one owner)

☐ Religious, Charitable, Educational or Governmental Agency (circle one)

☐ Sole Proprietorship (legal owner’s name):

☐ Individual

☐ Other – Please identify:

TAXPAYER (federal) ID# — FEIN or Soc Sec
   (use the line corresponding to your legal status line)

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Confirmation of Addendum Receipt

The Vitality Group confirms that we received Addendum No. 1 and Addendum No. 2 for RFP 18-15 Wellness Program Administrator.
Wellness Request for Proposal

This section includes questions about your organization, customer service, technology, programs, education and promotion abilities, reporting, Health Risk Assessment “HRA”, outcomes, implementation, financials, and performance guarantees.

1) State the type of company and the location of your home office as well as a brief history of your company including mergers and succession.

The Vitality Group, LLC, is a limited liability company headquartered in Chicago, Illinois.

Discovery Limited, our ultimate parent company and prominent international financial services organization, was first founded in South Africa in 1992. In 1997, Discovery launched “Vitality,” which is now embedded into all of Discovery’s products internationally. In 2008, Vitality was launched (via our organization, The Vitality Group) as a stand-alone corporate well-being offering in the U.S.

On December 19, 2016, we announced that The Vitality Group in the U.S. and Discovery Partner Markets in Europe and the Asia Pacific region have merged and will operate as Vitality Group. This merger is intended to consolidate our efforts into a larger, more resilient business with a unified strategy, executive team and consistent approach.

2) If you are submitting this with or as part of an alliance company or strategic partnership, what is the name of that partner? If you have partner alliances to perform duties per your programs, please list them.

We are not submitting this RFP response with or as part of an alliance company or strategic partnership; we are submitting this RFP solely as The Vitality Group, and should a contract be signed, it would be between the District and The Vitality Group.

However, to remove engagement barriers for our members and to enhance the overall value of the program, we have set up integrated partnerships with prominent names in physical activity tracking (e.g., Fitbit, Garmin, Polar, Apple, MapMyFitness), industry-leading biometric screening networks (e.g., Quest Diagnostics, Clinical Reference Laboratory), mindfulness meditation apps (Headspace, Calm, Apple Breathe), telephonic coaching (TrestleTree), reward partners (e.g., Amazon, Nike, Fandango,..), as well as Walmart and 70+ grocery store chains around the country for healthy food purchases.

3) Please outline the service model and team members that will be working with the District. (Customer Service Team/Implementation Team/Account Management Team/Others)

Vitality will provide you with a team of professionals to fully manage your program. We are flexible and available to provide services during agreed-upon time periods to accommodate the schedules of your employees. The following specific individuals will be providing program support:

Implementation Manager

- Oversight and management of all aspects of the implementation of the program.
- Works with the client, IT departments, and other vendors to ensure all the file
Wellness Request for Proposal

feeds and data integration are implemented smoothly;
- Ensures that all launch activities and communications are appropriately handled and conducts post-implementation monitoring.

Account Manager
- Interacts with clients and employees onsite, as well as over the phone and through email, educating and engaging them in the program.
- Manages the client relationship. Organizes health screenings, employer worksite programs such as biometric screenings and health and well-being fairs. This includes member education, website registration and navigation, and management of the Vitality Champ program.
- Recruits and accredits Vitality Champs and works with them throughout the program year to develop a calendar of events and activities to drive engagement.

Operations Support Manager
- Manages the day-to-day operations of the Vitality program including call center, administration and billing.
- Responsible for measuring progress and success of the program and reporting.

Client Relations Manager (account management)
- Responsible for oversight of account management as well as employer and member engagement.

Client Relations Manager (Implementation management)
- Responsible for oversight of Implementation Management Team including smooth transition from sales to implementation through to account management.

VP, Operations
- Responsible for oversight of implementation management, account management, employer and member engagement, call center and administration including billing and eligibility.

Marketing Director
- Provides strategic direction and oversight for a broad range of marketing and communications initiatives.
- Identifies appropriate communication materials and tools; and ensures effective and timely rollout of communications.
- Works with account managers to regularly evaluate effectiveness of communications program; revises program if necessary.

Actuarial Analyst
- Responsible for actuarial analysis on outcome reporting including measurement, programming, accuracy and communication of results.
- Provides thoughtful insights to assist clients and maximize outcomes based upon a thorough understanding of the underlying data as well as the results.

Call Center/Customer Service
Vitality’s call center specialists have been trained to help members register on the member portal, check their Vitality Points and Status, and navigate through the portal and see the programs available to them. Members can also contact the call center if they
Wellness Request for Proposal

have general questions about the Vitality program, such as how to check their goals or enroll in an online course. If a member has questions regarding their insurance or health benefits, the call center specialists will refer them back to their corporate benefits administrator or human resources. Our call center specialists strive to provide our members with the most convenient customer experience possible. We happily assist with all customer queries from 8 a.m. to 5 p.m. CST Monday – Friday.

Additional Implementation and Account Manager Details

The District will be introduced to their Implementation Manager and Account Manager during the kick-off call with Vitality. We assign based upon company culture, type of group, and the particular experience the account manager has in that area.

For reference, our Implementation Managers have an average of three years' experience in project management and implementation. They go through a rigorous and continuous training program on the Vitality program to ensure that each group launches successfully.

As part of our ongoing training and professional development initiatives, all of our Account Management Team has received either the Certified Corporate Wellness Specialist Certification (CCWS) or the Certified Health Education Specialist (CHES) designation. We require that all of our Account Managers have at least two years of experience in an account management role within the well-being industry. Each Account Manager is cross-trained on a variety of client populations and engagement approaches to the Vitality program, which ensures a well-rounded approach for the District's program. Ongoing training includes continuing education on health and well-being regulations, guidelines and legal compliance. We ensure all Account Managers have exposure to different types of engagement strategies through the consistent internal sharing of best practices.

For more information on the Account Management team, please see the following video, which highlights a variety of our account management team members:

https://www.youtube.com/watch?v=H2sEOLvy-JQ

4) Do you have experience providing wellness programs for municipalities or other units of government? Please describe, e.g. how many clients, years of operation, case studies, # of employees served, average ROI.

Yes. We currently have six clients in the government/municipality sector. Across these six clients, we serve 4,875 eligible employees; two of these six clients have an eligible employee count of at least 2,200. The average Vitality program tenure of these clients is 3.5 years.

Although we do not have case studies specific to these clients, we have provided the following case studies and testimonials that demonstrate ROI and program success:

- McKesson Case Study
- OrthoIllinois Client Testimonial
- Baylor College of Medicine Case Study
- Vitality Engagement Study
Wellness Request for Proposal

5) How many employer groups are you currently serving in the size category of the District (2,500-4,000+ employees)?

We currently have 21 employer groups in the size category of the District.

WELLNESS

6) Do you offer a Health Risk Assessment (HRA)? If Yes,

Yes. Vitality uses our own proprietary health risk assessment. We create an initial personal well-being profile for each participant using the HRA, known to members as the Vitality Health Review. The words “health review” – more positive in their connotation – encourage members to consider the many facets of their overall health rather than focusing primarily on their possible health risks. The HRA is a critical requirement to activate the program annually. Members are also awarded Vitality Points for completion of the HRA. Members are awarded a Fast Start Bonus (additional Vitality Points) if the HRA is completed in the first three months of the employer’s program year. This is important to provide added incentive and an impetus for employees to engage early in the year.

   a) In what format is your HRA offered?

   We offer both an online and paper HRA.

   b) Can you import biometric screening data obtained?

   Yes. Verifiable information obtained from biometric screenings is integrated into the program and overwrites self-reported HRA for the purposes of determining the Vitality Age and Personal Pathway.

   c) Will you provide an aggregate report to the District?

   Yes. Vitality’s standard reporting package includes numerous standard metrics, including HRA and biometric screening completion, completion for other health and well-being activities within the Vitality platform, risk transitions, motivation to change, biometric risk factors, lifestyle risk factors, risk perception, and much more.

7) Do you have a system for reminding participants when their yearly and age-appropriate screenings are due? If yes, please outline in detail.

Yes. Although members are not reminded of age-appropriate screenings, our platform sends monthly messages when a member has neglected to complete their HRA or their account has been inactive for 30 days after they have completed the HRA. These serve as gentle reminders of how much they have to gain by assessing their health and acting to improve it. Vitality also features a variety of triggered email messages to encourage members that are already active in the program as well as those who are not yet engaged. We have automated email messages that welcome new members, recommend goals, offer general support and inspiration, and provide Vitality Point updates.

In addition, Vitality highly encourages the participation in preventive care to their members.
Wellness Request for Proposal

We believe the journey towards well-being is a way of life that continually reinforces healthy habits. For that reason, we include a wide array of point-earning preventive activities for the District's population to participate in. This includes the following:

- Pap Smear
- Mammogram
- Colorectal Screening
- Flu Shot (includes H1N1 vaccine)
- Childhood Immunizations
- Annual Dental Exam

Documentation of the preventive care event can be easily uploaded via the online platform, or submitted through the mobile app via a smartphone camera.

Vitality is built in a way to address each member as an individual, and realizes that each individual's specific health risks and personal goals need to be considered – different from programs that use a one-size-fits-all approach. Instead, participants are given the opportunity to construct their own customized Personal Pathway to higher levels of Vitality Status and, in turn, better health. Vitality begins by asking the member questions about their lifestyle and preferences (e.g., current levels of physical activity, overall health status, etc.) and then provides feedback tailored to their individual responses.

As an example, a member who wants to move up to Gold Status would see the number of points required to do so, as well as the suggested activities that would help them get there. The member has full visibility to how many points each activity is worth and can add or remove activities from his or her pathway as desired. This allows the member to create a personalized well-being journey that focuses on his or her interests and desires. The pathway is dynamic and can be updated at any time by the member. A sample screenshot of these program components is shown below.
Wellness Request for Proposal

From a goal perspective, Vitality offers members a wide range of topics to choose from. Goal setting helps bring focus to what the member wants to achieve by helping them commit to something that is important to them. Vitality will use data from the member’s HRA responses and/or a biometric screening to suggest goals that are a good fit for their health profile. For instance, if someone is a cigarette smoker, we may flag a goal that supports that individual’s effort to quit tobacco. Goal-setting is simple and guides participants in creating a targeted plan based on their personal motivations, while also being provided the support needed to find, build and maintain healthy habits. Members are rewarded for checking in and recording their progress on the goals that they select, putting the emphasis on awareness, accountability and individual growth.

Additionally, the member experience for Vitality is created in a way to meet the individual where they are by providing them with recommendations, messaging, and updates based on their specific profile (e.g., age, gender, risk factor, engagement level and activities). Example: if a member selects a goal to lose weight, they may receive a triggered newsfeed post recommending our nutrition courses. If they have already completed the nutrition courses, they will instead receive a post directing them to a different resource within the site regarding weight loss. Also, please see below for an example of a member dashboard where the member is participating in financial wellness components of Vitality and receiving messages in regard to that topic.
Wellness Request for Proposal

Additionally, as members engage, or don’t engage, their newsfeed will present different messages. For example, a member may receive a post with a “Good Job” badge after they’ve completed their first workout (or a milestone workout as shown to the side here) as a Vitality member or a celebratory post when they achieve a new level of status; a member who has not yet engaged may receive a message coaxing them to learn more about a particular aspect of the program or we may present statistics about what our membership as a whole has accomplished. Members that have not checked in on their goals may receive a nudge to go into their goals to track how they did that week. The newsfeed taps into a member’s emotions, and through interactive surveys, their desire to express an opinion. By giving them a sense of making progress and belonging to something that can approach well-being with humor, we are tapping into other important intrinsic drivers for change.

These intelligent communications and interventions are embedded throughout the Vitality platform and are customized to speak to a member’s full health profile, not just one piece of the puzzle. In this way, we speak to each member personally in a way that will resonate with them.

8) Regarding Health Risk Assessments, please attach a copy of one we might utilize.

We have attached two versions of our Health Risk Assessment:
- Vitality HRA - Member Portal
- Vitality HRA - Paper Copy

9) What are your quality assurance policies? Who in your organization is responsible for oversight of the programs? Will that person be accessible to the District?

The Vitality Group’s parent company, Discovery Limited, is an ISO-accredited organization, and as such we leverage the same QM techniques and practices. The Vitality Group has a dedicated Quality Assurance function that oversees all activities, and report findings and breaches to a weekly management committee. Scope of audits include:
- Call Center
  - 2% audit on all calls
  - Focused audits on call types
  - Sample audits on work resulting from calls for process compliance
  - Over-sampling of critical processes
Wellness Request for Proposal

- Operations
  - Over-sampling of all manual capture activity for accuracy and process compliance
  - Statistical sample assessments of all batch upload processes
  - Statistical sample assessment of automated services submissions

Our quality improvement cycle focuses on identifying root causes to issues and quickly working to resolve these. We conduct quarterly risk assessments across our business with these being presented and audited by our corporate risk committee. In addition, we hold biannual external audits across the business focusing on operational and financial processes.

From a programming perspective, we place a great deal of rigor around our development process. For enterprise changes the process is as follows:

- Requirements peer review between Business Analysts
- Requirements review by System Architects
- Design peer review between System Architects
- Design review by Enterprise Architects
- Verification of source code through Developers’ peer review and tools
- Compliance with architecture standards:
  - Coding Standards
  - Library Standards
  - Presentation Layer Standards
  - Content Layer Standards
  - Persistence Layer Standards
  - Messaging Layer Standards
  - Security Standards
  - Testing Standards
  - Build Standards
  - Testing

After implementation, your Account Manager will be your primary contact/person. As standard, your Account Manager will coordinate with the appropriate parties if any questions arise regarding our quality assurance policies. Should the District need to speak with another Vitality team member regarding quality assurance measures, we should be able to make arrangements to do so depending on the need.

Process Excellence Institute

As part of our Lean journey, we also have the Process Excellence Institute (PEI) – a specific department dedicated to instilling quality through our product and services. PEI provides the framework to maintain and enhance the highest standards of service within our business environment. PEI contains the functions of training, audit, process improvement, and customer insights. These functions allow PEI to drive towards the following objectives:

- Ensuring all business operations reflect The Vitality Group’s core mission and values
- Providing products and services that comply with statutory and regulatory requirements and are based on agreed to standards
- Dazzling clients with every interaction
- Consistently measuring, analyzing, and adapting existing processes, audits, and reviews
Wellness Request for Proposal

- Understanding root causes, thereby improving the efficiency and efficacy of functions and their processes
- Managing new processes throughout the business to ensure that quality requirements are met
- Ensuring that each Vitality employee is aware of their roles and responsibilities with regards to achieving our quality objectives within their business areas

We apply this Lean Thinking as a foundational methodology, driven by applying servant leadership, to create a highly engaged employee culture that produces world class operational excellence through predictable delivery and well-defined standard operating procedures.

10) Do you have the ability to perform an audit if requested, and if so, what cost if any?

Annual engagement, health results, and claims analyses provide an accurate picture for the District of the engagement and progress in the overall population’s well-being journey. These measures are already included in our standard reporting offering. Any additional desired analysis/audit of the program would need to be further detailed before Vitality could confirm our support, assistance and cost (if applicable).

COMMUNICATION

11) What is your overall communication strategy?

Communication is key in any well-being initiative (our data shows that having strong communications can increase the size of the high-engaging population by 25%); however, communications need to be strategic and well-supported to truly reach and resonate with all members. Where others in the industry rely on generic messaging, we’ve structured sophisticated and personalized communication mechanisms both native to the Vitality program and customizable by the employer, all with the support and guidance of your Account Manager.

The member messaging created by Vitality is built to be tailored, familiar, engaging and consistent — presenting pertinent information at a time that makes the most sense for each individual member. Dynamic content, including congratulatory messages, surveys, links to articles, videos and more are presented to members multiple times daily via the homepage newsfeed, a powerful communication channel for both Vitality and our clients. The newsfeed drives sustained engagement through messages tailored to the individual’s health profile, readiness to change, activity in the program interests, while also featuring interactive content for all Vitality members. Along with the Newsfeed, members receive messages through their Message Center inbox, homepage alerts, smartphone push notifications, email and more, ensuring each member has access to information in the way that is most comfortable and effective for him or her.

For District-specific messaging, we provide guidance, strategy and robust and user-friendly tools, to deliver a wide variety of communications for all stages of your Vitality program. We will work with you to map out intended focus, goals, challenges and even messaging from your executive suite to develop a detailed communication calendar.
Wellness Request for Proposal

The District administrators will have a distinct form of access to Vitality through the Employer Portal, which includes:

- **The Communications Center**, where the District can find professionally created, on-demand Vitality program marketing templates for quick and easy distribution. The templates are available in a variety of formats (email, flyer, posters, etc.) to support program engagement on all fronts (e.g., pre- and post-launch material, program feature information, C-suite toolkit and support, social campaign information, program year transitions) and can be further customized to reflect the District's voice, tone and branding.

- **Targeted member messaging** can be configured directly and immediately through the Employer Portal. District-specific member messages are given prime real estate on the website (custom homepage alerts, Newsfeed posts, inbox messages). Push notifications can also be sent directly to members' smartphones. Many portal communications can be designated by employee subset, location or specific risk factors to ensure that they are reaching the appropriate audience. As part of our Gateway integration platform, we also provide the District with a customized resources page to share information on company-specific programs, benefits, events and more.

12) Please describe how you will assist the District in communicating the Wellness Program to its employees.

Our goal in working with the District is to provide the strategies and tools you need to successfully launch and reinforce program participation among your population, build excitement for healthy lifestyles and create a culture of health within your organization. We have extensive experience helping clients transition from their current well-being solutions to the Vitality program, and we will analyze the District's previous well-being efforts to understand where there were successes and what areas were not working. Through the implementation discussions, as well as the on-site member education sessions discussed below, we begin to learn about your culture, demographics, and communications style to develop a calendar for the launch and program year, as well as your long-term strategy. To promote the initial launch of Vitality, we offer some best practices and timing in member communications that have worked for our clients.

At a grassroots level, your Account Manager will also offer assistance and guidance in building and supporting your Vitality Champ program. Vitality Champs are selected employees of the District who the District and Vitality arm with resources, training, tools and support to successfully promote and help administer the Vitality program. Data shows that social networks and connections can have a profound impact on an individual's health and behavior; the best-practice guidance, setup and support of the Vitality Champs program has been proven to increase engagement and overall perception of the program by creating a culture of health within the workplace.

13) How do you address communication and language barriers?

Our aim is to meet members where they are by providing them with recommendations, messaging, goals and updates based on their specific profile (e.g., age, gender, risk factor, engagement level and activities). Example: if a member selects a goal to lose weight, they may receive a triggered Newsfeed post recommending our nutrition courses. If they have already
Wellness Request for Proposal

completed the nutrition courses, they will instead receive a post directing them to a different weight loss-related resource within the site.

These intelligent communications and interventions are embedded throughout the Vitality platform and are customized to speak to a member's full health profile, not just one piece of the puzzle. In this way, we speak to each member personally in a way that will resonate with them.

Because we understand that engaging each member requires more than a single method of communication, we have a host of marketing tools to help you engage your population:

- **Communication Center** provides the option of quickly accessing pre-made Vitality program designs for quick and easy distribution, or the ability to further customize your own program communications with easy-to-use templates. Communication pieces are available in various file formats to accommodate in-house quick print, outsource printing or email distribution.

- **Triggered communications** providing frequent, positive interactions that urge members along via automated email messages that welcome new members, offer encouragement and provide Vitality Point updates.

- **Customized push notifications** sent directly to members' smartphones

- **The Vitality message center and home page alerts** are ways to excite members to participate in an onsite well-being event or drive engagement to certain components of the Vitality program.

- **A C-suite tool kit and engagement strategy** that provides leadership with the tools and step-by-step guidance to become active participants and engage and inspire employees

- **Twitter, Facebook, Instagram and LinkedIn pages** for members to follow, interact with Vitality, read educational articles online, and motivation through success stories and encouraging words from others. The Vitality Virtual Training Club on Facebook is a prime example of a monitored site where Vitality experts can interact with members and support can be provided from one member to another. We also use social media such as Instagram to host several engagement tools for members.

**Newsfeed**
As a further exploration of the Vitality Newsfeed, the District will have the flexibility to post text, pictures, files and links to the newsfeed, which is presented on each member's homepage. An example of this could be sharing pictures from a recent company picnic or reminding employees about an upcoming challenge to register for. This allows the District to push employer-specific communications and information to the population at your own discretion.

In addition to this employer-driven functionality, Vitality posts personalized messages and content to each individual member's newsfeed daily based on their interests, health profile, readiness to change and much more. As an example, as members set goals or link fitness devices to their Vitality accounts, they will see Newsfeed posts specific to these events and activities. Newsfeed posts use easy-to-understand and conversational language to celebrate personal achievements, share links to articles, hold surveys, introduce embedded videos and much more, providing fresh and personally relevant content in a variety of formats to keep members engaged and enthused.
Wellness Request for Proposal

Spanish Capabilities:
The interactive and personalized Vitality experience – through which members receive instant feedback about their current health status, complete and submit activities that improve their health and access a series of positive rewards – is accessible to anyone who prefers to participate in Spanish. We offer the following services for Spanish-speaking members:

- **Web portal:** Our Spanish site includes all the key elements of the Vitality Personal Pathway including the HRA, My Health Results, Vitality Squares, the mall homepage, and personalized goals. Spanish-speaking members can also call our Customer Care Center and choose to speak in Spanish with a Customer Care Representative as well as learn more from educational flyers available to the client in our Communications Center. Please note that certain online education modules and the Challenges Platform are available in English only.

- **Written materials:** Spanish communication materials are available in the Communications Center. This is a great way to include Spanish speaking members in the communications strategy and ensure that the population is being reached.

- **Coaches:** TrestleTree, Vitality's pre-integrated telephonic coaching partner, can tailor communication methods and print material to assist Spanish-speaking individuals. When the need arises to coach a participant in another language, TrestleTree will work with a translation company to conduct coaching sessions.

- **Biometric Screenings:** If selected as the employer's biometric screening vendor, Quest Diagnostics would be able to provide Spanish-speaking examiners (based on availability, location, and prior notice of which facilities would need the second language).

14) Please provide the mediums used to disseminate information, such as website, direct mail, telephone, etc.

Through our on-demand Communications Center, the District has the option of quickly accessing pre-made Vitality program designs for quick and easy distribution, or the ability to further customize their own program communications through the use of easy-to-use templates. Communication pieces are available in various file formats to accommodate in-house quick print, outsource printing or email distribution.

Our platform technology also provides the District many other ways to communicate directly with employees, including newsfeed posts on the member homepage, inbox messages through the message center, push notifications to the member’s smartphone, and more. Please see question 13 above for additional details.

15) **Do you have a toll free number for customer use?**

Yes. Members can call our Customer Care center at (877) 224-7117 with any questions regarding our program.
Wellness Request for Proposal

16) Do you have a website? Is it interactive for employees’ use and do you build websites for employer groups? Do you have a mobile app?

Yes. As shown in the screenshot below, the member portal is personalized to each participant with information specific to them (Vitality Status, Vitality Points, Personal Pathway Activities, etc.) and with information available to all of the employer’s participants. There is also the communication of continuous program updates and company-related messages to Vitality members via the newsfeed and inbox messages. Easy access is provided to the individual’s profile, HRA results, point earning activities, and various other components of the program.

Links to the member’s integrated fitness devices and partner grocers are located underneath the home page image and can be managed at any time. If someone purchases a new Fitbit, for example, they can easily link the device and sync their account to Vitality. Should they have any questions or experience an error, step-by-step instructions, answers to frequently asked questions, and other general details are also available.
Wellness Request for Proposal

Regarding building websites for our employer groups, as part of our standard offering, we can co-brand Vitality with the District's logo. Additional branding options (including a customized color scheme) are also available for an additional fee. Co-branding and client-specific information to include on the Employer Incentive Plan page within the member portal would be discussed during the implementation phase with the District. For incentive strategy criteria, Vitality would work closely with the District to create a strategy based on your needs and company objectives. The Implementation Manager assigned to the District is then responsible for adding that information to the portal. Your Implementation Manager would then work with you to determine language that is specific and appropriate for the District's population.

With regard to the Employer Portal and the features within it that allow the District to further communicate with and engage your population, your Account Manager sets this up post-implementation and trains the designated District contact on the site. This is where the District would be able to access various engagement tools including customized messaging capabilities, the challenges platform, and downloadable metrics and reports. For any kinds of customizations outside of our standard configurations, Vitality's approval is required and a proposal will need to be developed and signed off by the client before work begins.

Vitality Today Mobile App

As mobile technology has revolutionized the ways people are able to interact with each other, products, and even their own health, Vitality goes wherever members go with the Vitality Today mobile app. This free app is a key touchpoint for members to engage in Vitality while on the go, including the opportunity to:

- Complete the HRA and view their health results
- View their Vitality Age, Vitality Points and Vitality Status
- View custom newsfeed stories and alerts from their employer, in addition to a daily feed of educational posts
- Check in on personalized goals and set new ones
- Upload verified activities (athletic events, preventive care and more) for Vitality Points
- Use GPS to locate the nearest, most convenient gym in our Partner Gym network
- Log a verified gym workout for Vitality Points
- Engage in our HealthyMind offering (sleep, meditation, stress)
- Securely log in using Touch ID
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Designed to reduce the perceived administrative burden often associated with a well-being program, our app engages members on-the-go. For example, someone taking part in a 5K or triathlon can verify their participation by simply snapping a photo of the racing bib and tapping “Submit.” Likewise, members can record verified workouts at the touch of a button with our health club “check-in” technology that confirms a member’s presence in a fitness facility using GPS when they enter with their smartphone.

Designed to complement the smartphone app, our member website has a responsive, mobile-friendly design, allowing for easy navigation of our full platform on smartphone and tablet browsers. To provide a seamless online experience, members can navigate between the smartphone app and the Vitality website via built-in, single sign-on links. This functionality allows members to access the full breadth of the website with the simple touch of their smartphone screen without having to re-enter their log-in credentials.

A key innovation focus for our development team is mobile enhancement and further leveraging the app as an engagement driver. Accordingly, we conduct monthly software updates and aim to add at least two to three large, new features per year.

17) Please describe how your company coordinates communication among health plan vendors. Detail any specific alliances, contacts, ownership relationships or strategic partnerships with

- PBM
- Networks
- Utilization Management
- Third Party Administrator
- EAP
Wellness Request for Proposal

Globally, Vitality pursues a model of shared-value insurance and is engaged in strategic partnerships with some of the largest and most successful health and life insurers around the world, including John Hancock in the US, Manulife in Canada, Vitality Health and Vitality Life (formerly Prudential-owned) in the UK, Generali in Germany and France, Ping An in China, Sumitomo Life in Japan and AIA in Singapore, Australia, Thailand, Philippines, Malaysia and Hong Kong. In the U.S., with regard to health plans, Vitality is not currently engaged in any strategic partnership, alliance, or ownership relationship with any of the above.

With regard to EAP and other employee benefits, such as telemedicine vendors transparency tools, etc., Vitality does have the ability to incorporate the District’s third-party vendors and other employee benefits/initiatives into our platform through our Gateway solution.

As previously mentioned, we have set up integrated partnerships with prominent names in physical activity tracking (e.g., Fitbit, Garmin, Polar, Apple, MapMyFitness), industry-leading biometric screening network (Quest Diagnostics), mindfulness meditation apps (Headspace, Calm, Apple Breathe), telephonic coaching (TrestleTree), reward partners (e.g., Amazon, Nike, Fancango), as well as Walmart and 70+ grocery store chains around the country for healthy food purchases.

Employers can choose from our breadth of curated resources and vendors or can feature their own benefits and program offerings. Gateway will seamlessly integrate these offerings, supported by our expertise in behavioral science to drive deeper engagement. Gateway will meet the employee where he or she is, and when he or she is ready, based on the employee’s individual health status, personalized pathway, lifestyle decisions and engagement activity with us.

Gateway is offered at an additional PEPM fee, added on to the core administration fee quoted in our RFP submission; we are happy to work with you to better understand your third-party vendors and provide a quote.

Vitality Gateway can incorporate the District’s third-party vendors and other employee benefits/initiatives into our platform in the following ways:

- **Promote**: Details on and/or links to the District’s offerings can be promoted through the dynamic homepage promotion tiles, Points Planner, newsfeed and in-app mobile notifications.
- **Steer**: In addition to general promotion, at-risk members’ Health Results Report and targeted messaging further guide members to relevant program offering details.
- **Motivate**: Points and/or other rewards can be awarded to members for participation with the offerings. Participation can be tracked through Employer-uploaded files in Vitality’s standard format, a member self-submission mechanism with documentation, or a direct data exchange with the third party (sent to Vitality).
- **Connect**: Through the mobile app, Guide to Vitality and Employer Resources page, members can access program details, links and single sign-on capabilities that can easily connect them to the relevant programs and assist in managing their health risk or condition.
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18) Please provide information on your HRA tracking, sample newsletters, and other health promotion and education.

HRA Tracking
From an employer perspective, monthly, quarterly and annual reporting will contain metrics on HRA and biometric screening completion. From a member perspective, upon completion of the HRA, members are provided a detailed analysis of the HRA results called the Health Results Report. This report provides the member with an analysis of their own personal risks. The member portal provides employees the opportunity to review their historical, verified biometric results in a clear, organized format. Vitality members can view their health results in the form of a longitudinal chart or table. Members can also see their self-reported results side-by-side with their verified results in a table format. Please see question 28.a for additional details.

Newsletters and Other Health Promotion
While not by definition a newsletter, Vitality offers a monthly webcast which is advertised on the Vitality member portal. Each campaign is designed to enhance engagement in relevant activities in the Vitality portal, therefore increasing engagement in not only Vitality, but also adopting healthy habits for the future. Vitality members are also incentivized to learn through the awarding of Vitality Points for their webcast attendance.

In conjunction with the Health FYI webcasts, Vitality recently launched a year-long engagement initiative consisting of four campaigns related to healthy living. This campaign, Healthy Weight for a Healthier You, can be accessed on the member homepage. The other three campaigns (implemented quarterly) focused on:

- Men’s and women’s health
- Family Health
- Mental well-being

During each campaign cycle, members receive—at most—a weekly email with tips, advice, recommendations and Vitality activities to get engaged. For each completed activity (e.g., participate in a conversation, engage on social media, complete a survey) members will receive a ‘virtual raffle ticket’ towards an entry into a drawing for a prize valued around $150. Three lucky winners are randomly selected from each campaign to choose a prize (e.g. Fitbit Aria Scale). After each campaign, the District will be provided with high-level metrics (e.g. number of all Vitality members who participated).

Both the Health FYI webcast and quarterly campaigns are included in the Vitality program administration fee.

From an employer perspective, Vitality has a monthly email newsletter, “Vitality in Step”, that will be sent to the District on a monthly basis from your Account Manager. This newsletter covers Vitality updates, the Health FYI topic for that month, and other important news items.

We also offer a variety of online education activities through our portal that are centered on

TAKE A STEP TOWARD A HEALTHIER WEIGHT EACH WEEK

Ever wonder what role weight plays in your overall health? Join more than 10,000 Vitality members receiving weekly emails full of information, advice, tips and challenges designed to inspire nutritional eating, physical activity and healthy habits that you can incorporate into your everyday life. Plus, you’ll have a chance to win an excellent prize for completing suggested activities. Sign me up now!
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modifiable lifestyle choices such as physical inactivity, poor nutrition, excess weight, stress, high cholesterol, high blood pressure and smoking. Please refer to question 28.b for additional details.

19) Can you provide educational materials, seminars such as lunch and learns, health risk assessments, and team building wellness initiatives like weight loss coordination, smoking cessation and other wellness initiatives? Please give details of all programs offered.

Yes. In order to build and support the culture of health within the District’s organization, we provide action-oriented, data-driven and insightful tools and support to make smarter, more confident decisions about the future of your business. This includes the following tools and support, with the core focus to optimize the District’s investment in wellness:

Member Features Included in PEPM Administration Fee:

- **Online wellness platform** allowing members to integrate devices, participate in learning activities and challenges, and track progress through Vitality program with goals setting and Vitality Status
- **Suite of assessments** (Health Risk Assessment; Mental Well-being Review; Physical Activity Review)
- **Personal Pathways**, which personalizes an engagement plan for each member using their health risk factors and personal goals
- **Vitality Age** – a risk-adjusted age and powerful visual tool that serves as a constant barometer of overall health status (dynamically updating with each activity)
- **Vitality Today mobile app** allowing easy participation in program elements, such as event submission, gym check-in and goal progress check-in
- **Fitness device integration** to make tracking physical activity easy and seamless
- **Communications and portal newsfeed** with program and District-specific news and information
- **Vitality Challenges Platform** creating a social aspect of wellness through friendly competition
- **Vitality HealthyFood program**, making eating healthy more affordable and accessible for employees and their families by awarding members Vitality Points and real-time discounts on nutritional foods
- **Living Smoke Free**, a proprietary online tobacco cessation program designed with interactive and inspirational touchpoints following national guidelines and incorporating evidence-based behavioral economics and incentives
- **HealthyMind**, encouraging members to improve their well-being by engaging in mental health-promoting activities
- **Financial Well-being**, to encourage members to develop a better state of financial well-being through goal-setting, self-guided educational resources and communications
- **Online Learning Center** including interactive ActionSets and Decision Points on a multitude of health and wellness topics (see question 28.b for additional details)
- **Nutrition courses** that go in-depth on how a member can make smart, healthy choices on what they eat and drink
- **Vitality Health FYI webcasts** on key health topics performed live by clinicians and/or health and lifestyle experts
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- Quarterly Health Campaigns further exploring health management topics in a push/campaign setting with weekly updates, newsfeed posts, surveys and opportunities for members to interact with Vitality via social media

Member Rewards Included in PEPM Administration Fee
- Vitality HealthyFood Program
- Vitality Squares
- Vitality Contribution Manager
- Vitality Active Rewards *
- Earn Apple Watch *
- Vitality Mall *
- Gym Rebates *
- Wellness Rebates *
* Available reward options facilitated through Vitality program, but not included in the administration fee

Employer Features Included in PEPM Administration Fee
- Designated and experienced account manager to support ongoing goals and objectives of the District’s wellness strategy
  - There are standard times throughout the year where onsite support is provided, including member education during launch and as additional onsite assistance is needed (travel costs will apply).
- Employer Portal for easy administration and program customization opportunities through easy to download reports, challenge administration platform and custom member messaging opportunities
- Maintenance of the member portal and content updates
- Platform configurability with ability to include client-specific communications, information, and logo
- Communications Center for quick communications in a variety of formats to communicate program components and upcoming events
- C-suite tool kit to provide leadership with easy-to-use communications to further drive launch and ongoing excitement for the program
- Awarding for participation in activities and District-specific events to further integrate the District’s culture and current wellness initiatives
- Challenges Platform for easy-to-administer challenges across various populations
- Incentive Design, Administration and Fulfillment support to create a rewards program that reflects the goals of the District
- Actuarially-supported suite of reporting that allows real-time decision making to optimize wellness
- Downloadable metrics and reports with actionable insights to be used to focus engagement and communication strategy
- Call center administration and management for member assistance
- Data feeds accommodating eligibility and partner networks
- Clinical and legal oversight to ensure data protection and legal compliance
- Reasonable alternative standard provided for all outcomes-based program elements
- IT infrastructure and security
- All aspects of program fully HIPAA-compliant
- Vitality Champ Program to further engage population with a grassroots approach

Please note: Additional fees apply for printed or customized communication materials.
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telephonic health coaching through our pre-integrated partner TrestleTree, and any non-standard data integration.

20) Please indicate any program accreditation you have or will have earned, and the agency giving the accreditation such as NCQA, URAC, JCAHO.

TrestleTree, our pre-integrated partner for telephonic coaching, is fully accredited by URAC for disease management. Quest Diagnostics, our pre-integrated partner for biometrics screenings is also URAC-accredited.

At this time The Vitality Group has not sought accreditation. However, although we are not NCQA accredited, we follow many of the same NCQA concepts that are applicable to our HRA/wellness solution. The questions in the Vitality HRA are based on scientific and medical guidelines, such as ATP III, and validated tools such as REAP and WAVE. Additionally, with over 20 years of experience and 35 million years of global member data collected, our HRA has been developed with a significant amount of behavioral and clinical rigor.

In addition, the Vitality program’s genesis in the life insurance environment has necessitated clinical rigor. Developed from the vantage point of a claims payer, Vitality focuses on driving engagement and maximizing the financial impact of activities on outcomes using an actuariably derived relationship. Although we have not pursued certification, The Vitality Group's parent company, Discovery Limited, is an ISO-accredited organization, and as such we leverage the same QM techniques and practices.

Actual accreditation has never been an issue, as all prospects and clients (U.S. and international) have comfort with the clinical rigor underlying the Vitality program. As further validation, numerous companies have performed exhaustive due diligence on our organization and the Vitality Program. As an example, John Hancock Insurance uses the Vitality platform to offer its customers access to Vitality's incentives program and other tools designed to support and facilitate behavior change.

21) How do you track and monitor complaints regarding service issues? How are those reported back to the District?

We track member complaints and suggestions via our Salesforce CRM application. Instances that require immediate manager interaction are routed to a defined escalation pool in our CRM. Members who are on the phone are warm transferred to a manager. The manager accesses the workflow pool and closes the case following resolution of the issue. We are able to track category, frequency, time to respond, and time to resolve of these specific escalations.

For issues that do not require immediate management interaction, we have alternative escalation pools that are managed by senior agents. These agents are trained to identify trends and escalate complaints and suggestions to applicable departments. We use specific keywords found in our CRM to track these types of inquiries, and can track frequency, category, time to respond, and time to resolve of these escalations.

This information can be reported back to the District during ongoing Account Manager calls that are held regularly.
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22) Does your firm have the ability to assist in the following activities: web casts, seminars, health summits, organizational competitions, and teleconferences?

Yes. Your Account Manager will interact with the District and employees onsite, as well as over the phone, through email and in webinars, educating and engaging them in the program. This individual will manage the client relationship, participate in onsite and virtual member education sessions, and assist in organizing employer worksite programs such as biometric screenings. Additionally, they'll work with the District to provide ideas, strategies and recommendations regarding communicating with members, well-being campaigns and a wide variety of activities to drive engagement. Account Managers also assist with the recruitment of Vitality Champs, provide detailed education of the program and website navigation to accredit the Champs, and work with them throughout the program year to develop a calendar of events and activities.

The Account Manager assigned to the District conducts onsite education sessions to generate excitement around the program and to help employees understand and use all of the great benefits that are available to them. We can provide the education directly to your employees or use a 'train-the-trainer' approach. Onsite member education for two sites is included.¹ These allocated visits can also be used for events other than member education if desired (e.g., health fairs/summits).

TECHNOLOGY:

23) What is the current system platform used to support your wellness promotion? Do you anticipate changing your current system in the near future? When was your last system change or upgrade?

We use our own proprietary platform to deliver our well-being solution. Our maintenance releases happen between once and twice per month. We strive for a large annual product refresh and communicate all plans three months ahead of any release.

We consider ourselves to be the industry leaders in innovation and market technology, continually adding new and groundbreaking features to our program. Our general aim is to improve engagement by making participation easier for the members while staying true to the latest clinical research and actuarial studies.

Please refer to the graphic below for a snapshot of the enhancements we have implemented throughout the years. Over the next two years, we plan to continue investing in website design, mobile capabilities, digital therapeutics, and nutritional and mental health. Our practice of beta-testing, evaluating usage patterns and analytics, and close communication with our clients regarding enhancements remains paramount as we pursue our goal to continually enhance the portal experience to be even more intuitive, engaging and personalized.

¹ A site includes the use of a Vitality employee for one business day. An onsite visit may be exchanged for a business day of up to four member education webinars. Reasonable time for meals and short breaks must be provided for Vitality employees. Additional onsite education and/or webinars may be purchased with the approval of The Vitality Group. Travel expenses for onsite education sessions are not included and will be charged by Vitality at cost.
24) What are your preferred methods of data delivery and receipt?

For member web portal interactions, data will flow via the internet over secure web protocols HTTPS (443). For all client file uploads, data will flow over SFTP (22) or FTP (21) with PGP encryption using MOVEit SFTP Solution.

Vitality does not share members’ PHI with any third party without the express written consent of the Covered Entity via an amendment to a Business Associate Agreement unless for treatment, payment or healthcare operations. Once proper documentation is in place, all data is encrypted and sent over a secure FTP network.

25) Please provide a list of all programs related to wellness promotion. Please also include programs you think would benefit the District, why they would be beneficial and the ROI attached to the program.

The Vitality program provides a single, comprehensive access point for all program interaction with the member, while delivering broad and seamless access to a robust network of fitness, screening, education, incentives and other solution partners. As such, we believe that all components of our program are related to wellness promotion. In our response to question 18, we have provided a list of member and employer features included in the PEPM administration fee that will support wellness promotion within your organization, including communication tools, member education resources, challenges, the Vitality Champs network, and ongoing account management support.

**Program Components That Would Benefit the District**

Vitality has worked closely with clients in a number of industries, including education and the public sector. Some of the concerns we have encountered with clients in similar industries as
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the District include:

- getting employees on board as some frequently have limited access to computers,
- concerns around getting all members across different locations and departments to “buy-in”
- limited visibility to onsite communication materials, and
- concerns about spending money on fitness devices and gym memberships.

To overcome these obstacles, we strategize with each client to develop tailored solutions. One of our recommendations for clients is to post communication materials in the common areas at each location where employees meet before starting their work day. To further assist the District with this initiative, our implementation team will take you through the features offered via our online Communications Center, with special focus on the rollout package that employs a variety of formats to reach your entire population and ensure an effective launch. User access will allow designated individuals at the District to customize select communications using templates and guided steps. Our standard materials cover the spectrum of communications needs, from general promotional messages to campaigns that inform and educate your population. Communication pieces are available in various file formats to accommodate in-house print, outsourse printing or email distribution.

If the District has specific health initiatives that you would like to further communicate to your employees (e.g., work-related events, etc.), you can post alerts and newsfeed posts to the homepage of the member portal, send inbox messages to members via the message center, or create push notifications for members who use Vitality’s mobile app. Each of these customizable communications can be specific to location and/or health risk group, and is an effective way to directly reach out to your population. For example, if the District hosts an education seminar, you could promote the event via a newsfeed post that includes information on the date, time, and location, and whether Vitality Points will be awarded for attendance.

We also encourage our clients to take advantage of the Vitality Champs, a non-computer based, grassroots program that promotes Vitality in the workplace. Vitality Champs are District employees who serve as well-being ambassadors, spreading the culture of well-being throughout your organization. It is encouraged to include a variety of positions and departments for Champs as they are the walking/talking viral marketing campaigns for the Vitality/District program and they need to be relatable to the entire workforce. This program provides a structure and feeling of ownership for all involved, while providing consistent direction and reinforcement of program strategy and goals.

Vitality Champs are provided with a host of different tools and resources to successfully promote the program, including:

- Assistance in the recruitment and identification of ideal Vitality Champs
- Champ accreditations via teleconferences
- Vitality Champ support materials and event planning assistance
- Support for Vitality Checks (biometric screening) and health fairs, including applicable onsite visits
- Ongoing communication of ideas and best practices to help Champs achieve success
- Continuing education sessions and supplemental support for servicing and administration questions

Some of our clients with dispersed populations have purchased devices for their employees to
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eliminate the challenge of motivating individuals who do not have a gym membership. Vitality is able to support this request seamlessly with very little administrative effort from the District. We manage this process by facilitating a discount through our online mall. The subsidized device program is currently available for Fitbit, Polar and Garmin devices offered on the mall. The District will be able to designate the dollar amount that you would like to subsidize for your employees (must be at least 25% of the device cost that you are billed) as well as who is eligible for the discount. For example, you may choose to offer the discount to only those members who have taken the HRA or completed a biometric screening. The cost of each device redeemed/subsidized will be billed back to the District on a monthly basis.

Additionally we have found that, with clients that have employees across multiple locations, setting up challenges to include certain locations (e.g., specific school locations) on teams is a great way to allow them to participate in competition with fellow employees (promoting teamwork and competition in a virtual manner). Even within Vitality, for example, the Sales Operations team (all housed in the Chicago headquarters) and the Sales Directors (located in various regions of the United States) teamed up together as part of the Steps Challenge being run throughout the company. This was a way to join together, interact within the challenges platform, and instill a sense of camaraderie between local and remote individuals to work together and support each other while participating in healthy activities.

Finally, our mobile app also allows members to engage in many of the activities offered on the Vitality portal, including the ability to register, complete the HRA, accept recommended goals, view Vitality Points and Status, and see recent events. Members can even upload verified activities from anywhere they use their smartphone. In fact, someone taking part in a 5K or triathlon can even verify participation through the app by simply snapping a photo of the racing bib. Members can also record verified workouts with our new health club “check-in” technology. Employers also have the ability to send custom push notifications directly to members' smartphones via the employer portal. Push messages can be population-wide or location-specific. We have found that the mobile app is a key engagement driver for population within the education industry and public sector.

ROI Attached to the Program

ROI is frequently used in the wellness industry in an attempt to measure the success of a program. Unfortunately, there are a number of limitations to using this metric, making it difficult to compare ROI metrics across programs. These include:

- Using ROI as the measure for a successful program assumes that cost savings alone are the benchmark to measure success.
- Evaluation methodology is inconsistent with that of most other employee programs or health interventions, such as health insurance, occupational health and safety, and food at work programs.
- Methodological issues, including: difficulty in capturing dollar amounts for all benefits, accounting for all related costs, mismatched time periods for costs and benefits, and inconsistency across different evaluations.
- Natural variability of health claims creates a wide margin of uncertainty around year-on-year movements.

Each client we work with has unique challenges, experience, and goals associated with wellness or their investment in a wellness program. We continuously measure our members on more
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value-associated outcomes such as job performance, absenteeism, and work satisfaction. However, we work closely with our clients to understand their goals and how they would determine the program being successful. In that regard, we help to create strategies and a line of sight into metrics such as:

- Breadth of participation, such as HRA completions
- Engagement in regular, ongoing, verified, health-related activities that continue year-round
- Measurable behavior change such as increased levels of physical activity, healthy food purchases, appropriate screenings, etc.
- Improved health outcomes through measurable biometric and lifestyle risk transitions
- Business results such as direct savings, indirect savings, morale, employee performance, recruitment, better alignment of incentives between the employee and employer, etc.

That being said, from a cost-savings standpoint there are a number of factors that contribute to the savings an employer can receive through their wellness program. Based on a three-year claims analysis we recently conducted, our metrics have shown 12% to 15% claims costs savings per highly engaged member per year².

These metrics reflect the savings an employer can receive through strong member engagement, and Vitality conducted an in-depth statistical analysis on our client base to quantify the impact of different factors on member engagement. In this study, we cover what incentives and employer support actions have the biggest impact on HRA completion, how to optimize program design, and common drivers of engagement that our high-participation populations have found successful. Our study shows that the most significant drivers of member engagement are the use of financial incentives and employer communications. Please refer to the attached "Vitality Engagement Study" to find out more about answers to key questions addressing the success of well-being programs.

² This claims analysis includes 12 groups between 21,000 and 52,000 members; highly engaged measure as Gold and Platinum Status.
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26) If you use web based technology or offer to build a website in your delivery of programs, please indicate below where appropriate:

<table>
<thead>
<tr>
<th>Included in Package</th>
<th>Additional Cost</th>
<th>Not Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Risk Assessment and the ability to provide comparative data</td>
<td>Yes. Included in PEPM administration fee.</td>
<td></td>
</tr>
<tr>
<td>Health education and information</td>
<td>Yes. Included in PEPM administration fee. Our online education tools and information are centered on modifiable lifestyle choices such as physical inactivity, poor nutrition, excess weight, stress, high cholesterol, high blood pressure and smoking.</td>
<td></td>
</tr>
<tr>
<td>Health promotion outreach; health newsletters, screening reminders</td>
<td>Yes. Included in PEPM administration fee. Vitality posts personalized messages and content to each individual member's newsfeed daily based on their interests, health profile, readiness to change and much more. Please refer to the &quot;E-newsletters available&quot; row below for details on the newsletters we provide. Screening reminders are available for employers to send to members and also post as alerts and messages through the portal.</td>
<td></td>
</tr>
<tr>
<td>Health coaching</td>
<td>Yes. Included in PEPM administration fee. A component of our online educational offerings, virtual coaching creates a personalized action plan for each member. This includes self-guided, engaging &quot;conversations&quot; that allow members to &quot;interact&quot; with a virtual</td>
<td>Yes. Vitality's pre-integrated partner for optional telephonic Lifestyle Management and Disease Management coaching is TrestleTree. Pricing is based on a per-participant (PPPM) model. Please refer to</td>
</tr>
<tr>
<td>Wellness Request for Proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Healthy recipes</strong></td>
<td>Yes. Included in PEMP administration fee. Within Vitality's online nutrition courses, a number of healthy recipe ideas offer a wide selection of appealing meals and snacks that make an excellent addition to a healthy lifestyle.</td>
<td></td>
</tr>
<tr>
<td><strong>Self care data and medical or symptom dictionary</strong></td>
<td>Yes. Included in PEMP administration fee. Our online health education tools contain self-care data and symptom checkers.</td>
<td></td>
</tr>
<tr>
<td><strong>Modules for disease management or healthy lifestyle</strong></td>
<td>Yes. Included in PEMP administration fee. Our online ActionSets and Decision Points help the member take an active role in managing a health condition. ActionSets provide information for day-to-day management of the health condition and interactive quizzes to measure knowledge along the way. Decision Points focus on key information and issues related to medical care decisions a member may face in a clear and easy-to-understand format.</td>
<td></td>
</tr>
<tr>
<td><strong>Rx information and education</strong></td>
<td>Yes. Our online education resources contain numerous informational entries on various medications.</td>
<td></td>
</tr>
</tbody>
</table>
| **Other online tools** | Yes. In addition to the other health education tools listed in this table, included in the PEMP administration fee are:  
  - Mental Well-being Review |
## Wellness Request for Proposal

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Activity Review</td>
<td>Yes. Custom member messages for the homepage and push notifications for the mobile app can be created, along with customization of the member platform newsfeed, including the ability to provide employer-driven content and links.</td>
</tr>
<tr>
<td>Health FYI webcasts</td>
<td>Yes. As part of our Gateway integration platform, we also provide the District with a customized resources page to share information on company-specific programs, benefits, events and more.</td>
</tr>
<tr>
<td>Interactive health tools and videos</td>
<td>Gateway is offered at an additional PEPM fee, added on to the core administration fee quoted in this RFP submission; we are happy to work with you to better understand your third-party vendors and provide a quote.</td>
</tr>
<tr>
<td>Living Smoke Free tobacco cessation program</td>
<td>E-newsletters available Yes. Included in PEPM administration fee. <strong>Quarterly Interactive Campaigns,</strong> which we call Vitality Health DIYs, provide members with the ability to opt in to further exploration of health management topics in a push/campaign setting. A new topic is introduced each quarter, and members will receive weekly updates through newsfeed posts including tips and advice, surveys, encouragement for members to participate in well-being through new channels, and</td>
</tr>
</tbody>
</table>

---

18-15 Wellness Program Administrator 60
## Wellness Request for Proposal

| Opportunities to interact with Vitality via social media and win prizes. |
| We also offer the Vitality In Step employer newsletter, which provides our clients with the latest exciting program announcements and reminders of information to relay to their employees. |

27) Are you willing to brand a website for our employees use with our logos and materials?

Yes. As part of our standard offering, we can co-brand Vitality with the District's logo. Additional branding options (including a customized color scheme) are also available for an additional fee.

We can also seamlessly incorporate the District's benefits information and company-specific communications. Through the Communications Center, clients have direct access to our full suite of member communications to help engage their population via email or print. Users have the ability to locate and download standard materials with a co-branding and footer customization option. We also offer a template feature where the user can choose topics, from those provided, and customize materials through guided steps with clear direction on content by choosing the default content or entering their own messaging.

28) Does your technology solution include:

a. Online personal medical records for participants?
   If yes, please describe

Although our platform does not provide members with their full medical record, members do have the opportunity to review their historical, verified biometric results in a clear, organized format. Vitality members can view their health results in the form of a longitudinal chart or table. Members can also see their self-reported results side-by-side with their verified results in a table format.

This Health Results section allows members to take stock of their current health status and learn where to focus their attention to work on health aspects that may need improvement. Health results are categorized according to results that are in a healthy range, results that are not in a healthy range that could be improved, and results that are unknown. Each result is accompanied with details that explain what a healthy target is for that result. Recommended resources are provided, including videos and coaching sessions, which encourage members to improve their biometrics and learn more about an at-risk measure. For metrics in a healthy range, information is provided to help members stay on track. Please see the screenshots below for a sample glucose section of the Health Results page.
Wellness Request for Proposal

HEALTH RESULTS

BLOOD GLUCOSE

TARGET RESULT

82.0 mg/dL

Upper limit for healthy blood glucose levels.

RECOMMENDED RESOURCES

Revisit the five ingredients in the recipe for success when it comes to healthy eating.

HISTORY

FASTING BLOOD SUGAR

View all historical data in a table format.

Report data that is incorrect.

Your Personal Target:

FASTING BLOOD SUGAR

BLOOD GLUCOSE

TARGET RESULT

82.0 mg/dL

Upper limit for healthy blood glucose levels.

RECOMMENDED RESOURCES

Revisit the five ingredients in the recipe for success when it comes to healthy eating.

HISTORY

FASTING BLOOD SUGAR

View all historical data in a table format.

Report data that is incorrect.

Your Personal Target:

FASTING BLOOD SUGAR

Result Date | Source | Result
---|---|---
3/7/2015 | Vitally Check | 82 mg/dL
3/5/2014 | Vitally Check | 85 mg/dL
2/27/2014 | VR | Don't Know
Wellness Request for Proposal

If yes, will HRA and Biometric data be integrated?

Yes. Information gathered from the HRA is used to determine a risk-adjusted age called Vitality Age that can be compared to actual age to provide an easy-to-understand indication of health status. Post-completion of the HRA, each participant is passed through a risk filter that adjusts their individual program based on risk, age, and gender. Each individual is provided a Personal Pathway. This tool is dynamic and updates based on biometric data received and program participation. Vitality gathers information from the member, analyzes it, and provides feedback on appropriate goals and activities that will help the member to manage their health.

Verifiable information obtained from biometric screenings is integrated into the program and overwrites self-reported HRA for the purposes of determining the Vitality Age and Personal Pathway.

b. Web-based consumer educational portals?

Yes. Online education activities offered through our portal are centered on modifiable lifestyle choices such as physical inactivity, poor nutrition, excess weight, stress, high cholesterol, high blood pressure and smoking. A core component of the Vitality program is our online educational tools that fall under the following categories:

**The Learning Center** is a comprehensive library of health-related topics members can navigate. Within each topic, the database provides helpful articles from medical experts and interactive tools – such as videos, symptom checkers, and more – that further engage a member to learn more about their specific health concerns. This includes a comprehensive database of information on topics such as:

- Mental and Behavioral Health
- Environmental Health
- Parenting
- First Aid
Wellness Request for Proposal

CORONARY ARTERY DISEASE

TOPIC OVERVIEW

WHAT IS CORONARY ARTERY DISEASE?
Coronary artery disease is the most common type of heart disease. It's also the number one killer of both men and women in the United States.

When you have it, your heart muscle doesn't get enough blood. This can lead to serious problems, including heart attack.

It can be a shock to find out that you have coronary artery disease. Many people only find out when they have a heart attack. Whether or not you have had a heart attack, there are many things you can do to slow coronary artery disease and reduce your risk of future problems.

WHAT CAUSES CORONARY ARTERY DISEASE?
Coronary artery disease is caused by hardening of the arteries, or atherosclerosis. This means that fatty deposits called plaque (say "plak") build up inside the arteries. Arteries are the blood vessels that carry oxygen-rich blood throughout your body.

Atherosclerosis can affect any arteries in the body. When it occurs in the ones that supply blood to the heart (the coronary arteries), it is called coronary artery disease.

When plaque builds up in the coronary arteries, the heart may not get the blood it needs to work well. Over time, this can weaken or damage the heart. If a plaque tears, the body tries to fix the tear by forming a blood clot around it. The clot can block blood flow to the heart and cause a heart attack.

WHAT ARE THE SYMPTOMS?
Symptoms can happen when the heart is working harder and needs more oxygen, such as during exercise. Symptoms include:

- **Angina** (say "Ann-inuh" or "ann-JY-nuh"), which most often is chest pain or discomfort or a strange feeling in the chest.
- Shortness of breath.
- Heart attack. A heart attack is sometimes the first sign of coronary artery disease.

Less common symptoms include a fast heartbeat, feeling sick to your stomach, and increased sweating. Some people don't have any
Wellness Request for Proposal

*ActionSets and Decision Points* help the member take an active role in managing a health condition. ActionSets provide information for day-to-day management of the health condition and interactive quizzes to measure knowledge along the way. Decision Points focus on key information and issues related to medical care decisions a member may face in a clear and easy-to-understand format. Examples include:

- Allergies: Avoiding Outdoor Triggers
- Quitting Smoking: Coping with Cravings and Withdrawal
- Diabetes: Checking Your Blood Sugar

### DIABETES: CHECKING YOUR BLOOD SUGAR

#### INTRODUCTION

Because you have diabetes, you need to know when your blood sugar level is outside the target range for your body. Fortunately, you can see what your blood sugar level is anywhere and anytime by using a home blood sugar meter (blood glucose meter). Using the meter, you can find out what your blood sugar level is quickly.

Knowing your blood sugar level helps you treat low or high blood sugar before it becomes an emergency. It also helps you know how exercise and food affect your blood sugar and how much short-acting insulin (if you take insulin) to take. Most importantly, it helps you feel more in control as you manage life with diabetes.

#### HOW TO TEST YOUR BLOOD SUGAR

Monitoring your blood sugar level at home takes the guesswork out of your daily diabetes care. You will know what your blood sugar level is at the time of testing. Here is a simple way to get started.

#### GET ORGANIZED

Before you start testing your blood sugar:

- Talk with your doctor about how often and when you should test your blood sugar. Record your blood sugar testing times. What is a pNR document?
- Link testing your blood sugar with other daily activities, such as preparing breakfast or before your afternoon walk. This will help you establish the habit of self-testing.
- Gather the supplies to test your blood sugar. Keep your supplies together so that you can do a test quickly if needed.
- Check your equipment before you do each test.
  - Check the expiration date on your testing strips. If you use expired test strips, you may not get accurate results.
  - Many meters don't need a code from the test strips, but some will. If your meter does, make sure the code numbers on the testing strips match the numbers on your meter. If the numbers do not match, follow the directions that come with your meter for changing the code numbers.
Wellness Request for Proposal

Nutrition Courses are comprehensive modules that go in-depth on how a member can make smart, healthy choices on what they eat and drink. This includes courses such as:

- Achieve a Healthy Balanced Diet
- Eating for Weight Management
- Eating to Boost Energy Levels

Let's compare a food high in natural sugar with one high in added sugar. You can see which food is more nutritious and much better for your health:

<table>
<thead>
<tr>
<th>A medium-sized apple</th>
<th>One Twinkie</th>
</tr>
</thead>
<tbody>
<tr>
<td>103 calories</td>
<td>145 calories</td>
</tr>
<tr>
<td>18g sugar</td>
<td>19g sugar</td>
</tr>
<tr>
<td>5g fiber</td>
<td>No fiber</td>
</tr>
<tr>
<td>Range of vitamins and minerals, e.g., Vitamin C, potassium</td>
<td>Negligible amounts of vitamins and minerals</td>
</tr>
</tbody>
</table>

HOW ARE SUGARS USED BY THE BODY?

When you eat sugar and carbohydrates, they get broken down into glucose - the simplest form of sugar - as they pass through the digestive system. Glucose then gets absorbed into the bloodstream and remains there where it is often called 'blood sugar' or 'blood glucose.' It remains in the bloodstream until a hormone called insulin comes along which allows the glucose to move from the blood and into the cells of the body to be used for energy. Glucose is fuel for your body. In fact, it is the preferred source of fuel for every cell in the body, especially brain cells. It is important that you don't completely cut sugar out of your diet as doing so can be harmful to your health.

Health FYIs and associated webcasts provide all members with information on key health topics on a monthly basis. Vitality members are incentivized to learn through the awarding of Vitality Points for their webcast attendance; webcasts are performed live by clinicians and/or health and lifestyle experts. Past topics have included:

- Learning how to Manage Stress
- Getting Better Sleep
- Setting a Healthy Example for Kids

Quarterly Interactive Campaigns, which we call Vitality Health DIYs, provide members with the ability to opt in to further exploration of health management topics in a push/campaign setting. A new topic is introduced each quarter, and members will receive weekly updates through Newsfeed posts including tips and advice, surveys, encouragement for members to participate in well-being through new channels, and opportunities to interact with Vitality via social media and win prizes. Past campaign topics have focused on:

- Heart Health
- Mental Health
- Family Health
- Nutrition
Wellness Request for Proposal

Living Smoke Free is a tobacco cessation program with interactive touch points following National Cancer Institute guidelines. Vitality weaves in evidence-based behavioral economics and incentives to motivate members to quit cigarettes, chewing tobacco, cigars, pipes, etc. Members are engaged through personalized newsfeed interactions, educational resources and Vitality Today mobile app notifications. This includes:

- Goal-setting and logging into the member portal on an ongoing basis to track personal progress and/or setbacks
- Triggered personal information in the member's newsfeed based on survey answers
- Messages, posts and mobile pushes with tips on handling cravings or mood problems, preventing relapses and avoiding weight gain
- Links to other tobacco-related resources
- Details on cessation aids
- Monday motivations and weekly round-up messages

**Cravings are just your body's attempt at getting nicotine.**

Yesterday
They are completely normal when quitting. Use your replacement behaviors, try to avoid your triggers and consider using nicotine replacement therapy to help.

**Another week down ...**

Yesterday
How did you do this week?

- I'm happy with how this week went! 74%
- I had a lot of cravings. 13%
- I slipped up. 14%

Total responses: 288

c. Reporting access for District management?

Yes. Through the Employer Portal, the District can log on — at any time — and access the following reports on the indicated frequency. Please refer to question 42 for our full list of employer reports.

- **Member Status Report (on demand):** member-level information on HRA & biometric screening completions, web registrations, and Vitality Status level for the current or prior program year
Wellness Request for Proposal

- **Activity Summary Report (on demand):** aggregate summary of selected Vitality activities (e.g., online education, physical activities) during selected months and program-year-to-date for selected months
- **Website and Mobile App Login Report (on demand):** member-level dates of the first and last logins for website and mobile app during a selected date range
- **Activity Report (monthly):** aggregate, monthly participation numbers by activity type and category, Vitality Status distribution and earned Vitality Points, comparisons with prior month and prior year program engagement, monthly activity trends for the prior two-year period
- **Liability Report (monthly):** aggregate, rolling 12-month view of outstanding reward liability across members (unredeemed Vitality Bucks)
- **Rewards Report (monthly):** member-level, previous month view of reward earning and redemption information, including the retail value of the Vitality Rewards each employee has received
- **Health Risk Report (quarterly):** aggregate, current program year view of health risk and perception of well-being within the employer's population, including Vitality Age differentials, HRA and screening participation, activity completion rates by risk category, identified risks and chronic conditions, and book of business comparison
- **Operations Report (quarterly):** aggregate view of Vitality's book-of-business service level metrics on customer service, call center performance, and website availability for the current and previous three quarters
- **Vitality Contribution Manager Report (weekly, biweekly or monthly):** member-level, current program year view of details specific to the client's incentive plan containing reward eligibility information based on the appropriate criteria
- **Challenge Reports (varies):** team and member-level data for each challenge on participation and progress, list of existing challenges, challenge status, and team and member leaderboards. Data is as recent as the previous day.

d. Smart Phone application(s) solution for iOS, Android, or other?

Yes. As previously described, Vitality goes wherever members go with the Vitality **Today mobile app.** Compatible with both iOS and Android devices, this app is a key touchpoint for members to engage in Vitality while on the go, including the opportunity to:

- Complete the HRA and view their health results
- View their Vitality Age, Vitality Points and Vitality Status
- View custom newsfeed stories and alerts from their employer, in addition to a daily feed of educational posts
- Check in on personalized goals and set new ones
- Upload verified activities (athletic events, preventive care and more) for Vitality Points
- Log a verified gym workout for Vitality Points
- Activate Vitality Active Rewards with Apple Watch and monitor progress toward weekly and monthly physical activity targets
- Engage in our HealthyMind offering (sleep, meditation, stress)
- Securely log in using Touch ID
Wellness Request for Proposal

In addition to the Vitality Today app, through our direct integration partnership with MapMyFitness, members can earn points for activity verified by this smartphone app. Members can also submit recorded steps and/or biometric data captured via Apple Health.

29) Please describe any plan for technology updates or new services.

Our maintenance releases happen between once and twice per month. We strive for a large annual product refresh and communicate all plans three months ahead of any release. We consider ourselves to be the industry leaders in innovation and market technology, continually adding new and groundbreaking features to our program. Our general aim is to improve engagement by making participation easier for the members while staying true to the latest clinical research and actuarial studies.

Please refer to question 23 for a snapshot of the enhancements we have implemented throughout the years. Over the next two years, we plan to continue investing in website design, mobile capabilities, digital therapeutics, and nutritional and mental health.

30) Are you willing to feed data to a third party?

Yes. As part of our Gateway integration solution (detailed in question 17), all third-party data exchanges (inbound and outbound) that occur within the Gateway platform will not incur any additional fees provided the data exchange adheres to Vitality's standard file format and file transfer protocols. Please note that Gateway is offered at an additional PEPM fee, added on to the core administration fee quoted in our RFP submission; we are happy to work with you to better understand your third-party vendors and provide a quote. Data transferred within Gateway, but not in Vitality standard file format would incur additional setup and annual maintenance fees.

31) What practices do you have in place to protect the confidentiality of individual information when electronic storing or transferring information?

Vitality takes all possible measures to protect and secure member information. Vitality and all partners used to deliver the program are compliant with all HIPAA, GINA, DOL, and similar standards and regulations. All aspects of the program are designed with personal data protection as the primary requirement.

Data is transported using Secure File Transfer Protocol (SFTP) during transit and encrypted using a 256-bit Secure Socket Layer (SSL) encryption. Through Oracle 11g, data at rest is encrypted using Advanced Encryption Standard (AES) 192 standard. All data is stored with a unique primary key "member entity number" to ensure integrity for each member's stored data information. We use an off-the-shelf product called MoveIT, which performs encryption at rest as well as in transit.

Our data is hosted by Equinix, which is SSAE16 SOC-1 & 2 Type II Certified. Data is stored in an Oracle database and encrypted at rest. All monthly backups are stored on LTO 5 tapes, which are taken off site and stored at a secure protected facility by a third party (Iron Mountain).
Wellness Request for Proposal

backups are stored to disk in the data center for 30 days for fast retrieval; this is done using data domains.

Vitality has both Firewalls and Intrusion Protection Systems (IPS) on all internet-facing connections. Vitality also has DMZ and several layers of VLAN network access that separate via a firewall interface, internet web servers from application servers and the Database layer. All remote system access requires SSL VPN with two-factor authentication, a further firewall layer on top of the network firewall.

Vitality also engages in an annual full Penetration test. Additionally, weekly vulnerability scans are done externally using SensePost (a third party) and internally using the licensed software Nessus. A weekly security forum prioritizes and manages the remediation and risk register tied to any findings.

All security processes and application requirements are handled by our Privacy and Security Committee (HIPAA). The confidentiality of personal health information is of the utmost importance and will always be treated as a top priority by Vitality. The Privacy and Security Committee and Security Officer are responsible for ensuring that:

- Policy decisions made by the Privacy and Security Committee are communicated;
- A process is implemented whereby Privacy and Security risks and breaches are identified and documented appropriately and that action plans are implemented to manage risks;
- A monitoring program aimed at monitoring Privacy and Security risks within The Vitality Group is established and maintained throughout the business;
- An awareness and training program is implemented;
- Business is informed of technological developments related to data Privacy and Security;
- Liaising with business to ensure that emerging threats are managed in a timely fashion;
- All risks and Privacy and Security breaches are reported to the HIPAA Committee;
- Data Privacy and Security related policies and procedures are implemented, updated as required and communicated to all stakeholders.

32) Do you have any predictive modeling capabilities?

Yes. A significant problem in healthcare today is that people overuse care based on symptoms of illness, and underutilize preventive care. This is consistent with what we know from behavioral economics, where people tend not to invest in something that costs them today if they only see the benefits in the future. In healthcare this imbalance is aggravated by fact that the true cost of healthcare services is generally not transparent and funded by those using the services; hence the incentive to invest in prevention becomes diminished.

One way of addressing this imbalance is to better communicate the implications of lifestyle risk to a member in a manner that contextualizes the impact today, thereby counteracting one's hyperbolic discounting bias. We do this using a risk-adjusted age, called Vitality Age, which can be used as a barometer of the long-term impact of lifestyle choices by comparing it to one's actual age. For example, a member who smokes and has high cholesterol may have an actual age of 40 but, based on the relative mortality risk factors, the member's Vitality Age could be 49. This is much more effective than telling a member that, for example, they might only live to 80
Wellness Request for Proposal

instead of 89, or using a score out of 100 that is difficult to contextualize. The Vitality Age offers
the member a quick and easy way to realize the connection between lifestyle choices and the
impact on their mortality and morbidity.

Highly Motivational Vitality Age

For a 35 year old smoker, how do we best frame the risk?

"Adult male and female smokers lost an average of 13.2 and 14.5 years of life, respectively, because
they smoked."  

· Vitality Age is an innovative and robust measurement of health risk.
· Every member is presented with a personal plan and goals to reduce their Vitality Age.

Vitality Age, to explain in further detail, is a purpose-built algorithm for creating awareness of
individual health risk for NCDs. It is focused entirely on those risk factors for cardio-metabolic
disease which are modifiable, and for which there is substantive evidence of a dose-response
relationship between levels of risk and disease. A team of clinical experts (PhDs and MDs), both
internal and external, worked together with our actuaries to develop the algorithm.

The Vitality Age algorithm relies on 14 modifiable risk factors that are derived from 25 self-
reported or verified parameters. All information is gathered via our HRA and/or biometric
screening. The Vitality Age calculation is dynamic and adjusts throughout the year as new data
is gathered by the program. By contextualizing the implications of lifestyle risks in the now, the
Vitality Age serves as a strong intrinsic motivator for positive change. Both on an aggregate
basis, and on a client-by-client basis, we examine the differential between Vitality Age and a
member's real age, and the trend of that differential, as an indicator of health improvement.

33) What is the maximum number of users for your website?

Vitality utilizes monitoring tools that look both at resource utilization and member experience
per session to ensure we service our clients and members per expected industry standards. In
the past, we have successfully serviced over 5,000 members concurrently through our website,
as well as 115,000 member sessions in one day. We have the ability to scale up to handle
additional load on the system as needed.
Wellness Request for Proposal

34) Please indicate if you provide information or programs regarding:

Regarding the following table, we interpret “Direct” to mean “in person”. While we have the ability to provide an onsite Account Manager (for an additional fee), the topics listed are all integrated into our online platform. Our call center and your Account Manager would be able to provide assistance on how to access these topics within our platform.

In addition, our responses to the “Telephone” and “On Location” columns are on behalf of the services provided by our pre-integrated health coaching partner TrestleTree. TrestleTree can provide both telephonic and onsite health coaching. Please see page 19 of the attached “Vitality Proposal for RPS 205” for additional details regarding TrestleTree’s coaching offering.

<table>
<thead>
<tr>
<th>Health Risk Assessment</th>
<th>Direct</th>
<th>Online</th>
<th>Telephone</th>
<th>On Location</th>
<th>Subcontracted</th>
<th>Name of Subcontractor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper HRAs available</td>
<td>Yes</td>
<td>No</td>
<td>Paper HRAs available</td>
<td>No</td>
<td>N/A</td>
<td>TrestleTree</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Body Mass Index Tracking</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
</tr>
</thead>
</table>

<table>
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<tr>
<th>Newsletters</th>
<th>No</th>
<th>Yes</th>
<th>No</th>
<th>No</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Health Promotion</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
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</table>

<table>
<thead>
<tr>
<th>Back Health</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Cholesterol Reduction at Risk Levels</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
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<table>
<thead>
<tr>
<th>Ergonomics</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Hypertension at Risk Levels</th>
<th>No</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
<th>Online = No</th>
<th>Telephone &amp; On Location = Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service</td>
<td>Online</td>
<td>Telephone &amp; On Location</td>
<td>N/A</td>
<td></td>
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<td>-------------------------------</td>
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<td>--------------------------</td>
<td>-----</td>
<td></td>
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<tr>
<td>Nutrition</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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<td>Physical Activity</td>
<td>No</td>
<td>Yes</td>
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<td>Pre-natal</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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<td>Smoking Cessation</td>
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<td>Yes</td>
<td>No</td>
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<td>Stress Management</td>
<td>No</td>
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<td>Yes</td>
<td></td>
<td></td>
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<tr>
<td>Weight Management</td>
<td>No</td>
<td>Yes</td>
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<tr>
<td>Behavior Change Programs</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Client Specific Programs</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Health Related Incentive Programs</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
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</tbody>
</table>
Wellness Request for Proposal

35) How will you evaluate the effectiveness of your outreach efforts?

We define success and the effectiveness of our outreach efforts as impacting health risks of the population—this means we've engaged the population, have provided the appropriate interventions through the communicated individualized Personal Pathways provided based on the member's risk factors, and by doing so, this impact is reflected in the risk migration of the population.

To track engagement levels across the population, Vitality measures many levels of data, including a variety of events submitted, activities in which members can participate and milestone achievements. The sum aggregate of this data serves as a gauge for the "success" of the program for our clients.

Participation begins with the member's first activity. Participation alone can be measured in basic industry metrics, such as HRA completion and biometric screening completion, but to sustain activity levels is to achieve a truer reflection of member engagement in our program, incorporating well-being into the everyday lives of our members. Achieving this truer metric of engagement means harnessing continued participation through a member's buy-in.

We believe a continual driver and measurement of engagement is Vitality Status. Vitality Status is a robust, proprietary measure of health engagement with five key aspects:

1. Equitable – HIPAA/ACA/GINA compliant
2. Simple – Incentives can be tied to Status for a single, stream-lined program
3. Aspirational – Members want higher Status to unlock greater reward opportunities
4. Competitive- Encourages competition between members
5. Optimized – Calibrated by actuaries for ROI

Each Status level (bronze, silver, gold and platinum) can be reached in a variety of ways, allowing members to "personalize" their own progress toward higher Status, keeping interest higher, instead of being prescribed specific activities to be completed. Higher Vitality Status results in enhanced rewards such as greater reduction in benefit contributions and bonus Vitality Bucks as a member reaches Silver and higher.

Our highly engaged clients are those that have higher percentages of members at the gold and platinum status, as reaching those levels take consistent activity in the program, work towards goals, and work towards overall individual well-being.

Members initially get engaged in the program for different reasons – challenges, Vitality Age, incentives, etc. Once members are "hooked in the program," Vitality triggers other pieces of the program (goals and other activities) to keep the engagement and interest level up. This is because these triggers are personalized to fit the member's needs, which will in turn keep the motivation, or "engagement" factor.

The charts below demonstrate the direct link between Vitality Status and program impact. As Vitality Status increases, there is a higher rate of biometric screening completion and physical activity, and a lower level of absenteeism and claims.3

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1 BioMetrics, Physical Activity & Absenteeism. Book of business study on participation during 2015 for members with a full policy year. Status measured as the highest Status achieved during the year.
2 Minutes per week and average sick days per year are from the Vitality Health Review. Claims Costs: Average outcomes from 2015 meta-study of multiple claims studies on Vitality clients.
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Additionally, for our book of business, higher Vitality Status correlates with improvements in Vitality Age across a member’s three years on the program. Below are two charts demonstrating the reduction in the difference between a member’s Vitality Age and their actual age at the different levels of Vitality Status- Platinum members seeing a 43% reduction in this gap.

An example of our program’s success can be seen at McKesson. As a client of Vitality since 2011, McKesson has seen great strides in the well-being of its employees, and was announced as a winner of the 2015 Koop Award. We worked with McKesson in a detailed analysis of its program to share the following successful milestones:

- Over the three years of this analysis, engaged adult participants increased activity levels by 92%.
- In 2014, 44% of employees averaged 80.7 workouts per year. Spouses also demonstrated a robust commitment to physical activity; 29% of spouses averaged 82.6 workouts per year.
- Employees that were “highly engaged” in the program spent $916 less on medical expenses per employee in 2014 compared to “low engaged” employees in 2012 and 2013. This led to overall savings of $4.7 million in medical costs for McKesson.
- Between 2012 and 2014, the high-engager group more than doubled in size from 2,091 to 5,167.
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36) How do you store data? Please give brief highlights of your data disaster recovery plan.

Data Storage
We are a privately hosted solution utilizing colocation (Equinix) data centers (private cloud). Vitality owns and manages all our infrastructure with the exception of our CRM solution, which is cloud-based using Salesforce.

Data is stored in an Oracle database and encrypted at rest. All monthly backups are stored on LTO 5 tapes, which are taken off site and stored at a secure protected facility by a third party (Iron Mountain). Daily backups are stored to disk in the data center for 30 days for fast retrieval; this is done using data domains. The confidentiality of personal health information is of the utmost importance and will always be treated as a top priority by Vitality.

Disaster Recovery
The goal of Disaster Recovery is to support the Business Continuity process. Disaster Recovery ensures that the infrastructure that support the critical business processes can be recovered within agreed and acceptable timescales.

The Disaster Recovery plan for The Vitality Group leverages that of our ultimate parent company, Discovery Limited. The Disaster Recovery site is used as an Active Data Center and is continually in synch with all production data. All archived data is replicated between the two sites. Application servers are deployed in an active-active mode across both sites and capacity is load-balanced between sites. Major database servers are failed over to alternate hardware in the event of a disaster. Email and fax servers are clustered. Internet facilities and cogent lines are balanced between data centers. Each year, the Disaster Recovery plan is fully enacted to test operability.

Production access via Citrix is available from any of our work sites (Chicago, London, Bournemouth, Johannesburg, Pretoria, Cape Town, or Durban). This flexibility of access mitigates risk of a pandemic in a particular geographic site. Our two Chicago Data Centers are SSAE16 compliant and have full redundancy on incoming lines and power and have backup generators.

We would immediately notify clients of any disasters that would affect the services delivered to them. The DR strategies that are applied for Discovery companies are as follows:

- Immediate Recovery – critical systems and services are available immediately.
- Intermediate Recovery - key systems and services are re-established within a four-hour period.
- Gradual Recovery – other services are re-established after the initial 24-hour period.
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37) Describe required elements of our other vendors such as third party claims administrator to provide efficient transfer of data and links. Please indicate if there are any legal issues, data transfer processes, or other specific data elements.

For outbound data transfers from Vitality, we can send a file with member-level HRA and verified biometric data to a third party at the District’s request. Per the Department of Health and Human Services’ regulations regarding the HIPAA Privacy Rule, express consent is required in order for a third party to perform outreach based on the PHI data we have supplied. We manage the capture of this consent through the Vitality member portal when required, and can share data for all members who have consented. Additionally, we require a Business Associate Agreement between Vitality and the employer, as well as a data-sharing agreement between Vitality, the employer, and the desired vendor. Data will be sent in Vitality’s standard file format.

For inbound data transfers to Vitality containing participation data with a third-party vendor, we utilize standard file formats. Depending on whether the District utilizes our Gateway platform and our standard file format, data exchanges may be subject to an additional fee. Regarding the ingestion of claims data, we provide an aggregate claims-based savings analysis in our reporting package at the end of the 3-year term for groups with over 3,000 employees. The receipt of claims data from one medical carrier and one pharmacy carrier is included as standard; we will work with you on file transfer protocols. If the District has more carriers, charges will apply for each additional file format. No charges will apply if the additional claims files can be sent in the same format as the medical and pharmacy carrier included as standard.

38) Does your firm have alliance with local health clubs or fitness facilities? If so, please name them and indicate whether or not you could contract with a facility of our choice?

Yes. We have discounts available for our members at four gyms: LifeTime Fitness, Curves, 24 Hour Fitness, and LA Fitness. While we are not adding any additional discounted gyms at this time, we do offer the ability for members to receive workout points at verified gyms in their area through our mobile app.

Members can record workouts with the Vitality Today smartphone app’s “check-in” technology. This feature confirms a member's presence in a fitness facility using GPS and internet connectivity when they enter with their smartphone. If the member is still in the facility after 30 minutes, Vitality automatically receives a notification and the member will be awarded points. We use a verification process for the Foursquare feature on the mobile app to guarantee the best user experience and prevent unauthorized check-ins. The verification is managed and adjusted by Vitality based on customer experiences and gym audits.

If a gym does not appear on the Vitality Today app, members can submit a request through the app to have that gym added (provided the facility registers as a gym on Foursquare). Vitality’s verification process confirms the validity of all gyms suggested by members. If a gym does not qualify, it will be blocked by Vitality. We feel that this process further demonstrates Vitality’s dedication to ensuring that verified data is entered into the system.
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39) What methods of data are used to indicate or identify individual risks or conditions?

As part of this personalized process, each member’s HRA data is analyzed and used to determine the relative risk of the individual as a result of their health behavioral risk profile. We gather information on over 10 risk factors, most notably smoking, poor nutrition, and physical activity. The level of each risk factor is classified as in-range or out of range to communicate to each individual where they are doing well and where they need to improve. Clinical ranges are based on national guidelines and position statements such as the Physical Activity Guidelines for Americans and the American Diabetes Association Standards of Care. When these are not available, key scientific references are used.

Based on this risk assessment, as well as their biometric screening results, information from our HRA and biometric screening is analyzed to determine a risk-adjusted age called Vitality Age. Calculation of Vitality Age is based on the relative risk for all-cause mortality for each of the risk factors we measure. To determine the relative risk for all-cause mortality and each risk factor, we reviewed 87 peer-reviewed publications and derived risk curves for each risk factor. This permits us to place an individual on each risk curve and model their individual risk in a more personal manner. The Vitality Age calculation is dynamic and adjusts throughout the year as new data is gathered by the program. Interventions across the health continuum are then weighted to incentivize participation in risk-reducing activities appropriate to the member.

Vitality also allows the member to set personal goals and offers members a wide range of lifestyle-related topics to choose from. Goal setting helps bring focus to what the member wants to achieve by helping them commit to something that is important to them. We use data from the member's HRA responses and/or a biometric screening to suggest goals that are a good fit for their health profile. Goal-setting is simple and guides participants in creating a targeted plan based on their personal motivations, while also being provided the support needed to find, build, and maintain healthy lifestyle habits. Members are rewarded for checking in and recording their progress on the goals that they select, putting the emphasis on awareness, accountability, and individual growth.

40) What incentives do you offer or suggest for member participation on your programs?

As previously described, post-completion of the HRA, each participant is passed through a risk filter that adjusts their individual program based on risk, age and gender. Each individual is provided a Personal Pathway. This tool is dynamic and updates based on biometric data received and program participation. Vitality gathers information from the member, analyzes it and provides feedback on appropriate goals and activities that will help the member to manage their health.

The Personal Pathway, including activities, recommended resources and goals, acts as a guide to help members understand what they can do to reach their objectives, and gives them a way to tailor their experience by focusing on what is important and personal to them. For example, if someone is a cigarette smoker, we may flag a goal that supports that individual's desire to quit tobacco. By providing recommendations and a clear path to well-being, while also allowing members a variety of ways to engage, we remove participation barriers and create an optimal user experience for each member and his or her preferences.

Through a comprehensive approach, Vitality offers a broad range of activities and programs for
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which members can earn Vitality Points, most of which are native to our platform and/or leverage our numerous partnerships and integrations, including:

**PHYSICAL ACTIVITY**
- Daily Workouts
- Athletic Events and Sports Leagues
- Physical Activity Review

**MENTAL HEALTH**
- Mental Well-being Review
- HealthyMind (sleep, meditation, stress)

**EDUCATION**
- Health FYI Monthly Webinar
- Health Resources (8,000+ Articles)
- Interactive Tools

**SOCIAL INTERACTION**
- Challenges
- Vitality Champs
- Social Media Campaigns

**LIFESTYLE AND NUTRITION**
- Nutrition Courses
- Optional Telephonic Coaching
- Living Smoke Free Program
- HealthyFood Grocer Discounts

**FINANCIAL HEALTH**
- Financial Resources and Goals
- Monetary Rewards

Through the Points Planner tool, we use gamification mechanisms to give the member a clear view of points they have earned and where they are able to continue earning. The points system is familiar and fun for members and satisfies the need for instant gratification; each point assigned is also intentionally calibrated to lead to habit-forming behavior and is closely linked to the most important factors that determine health risks and outcomes.

Vitality Points earned through health-promoting activities and outcomes accumulate throughout each year, earning members higher Vitality Status. An important market differentiator, Vitality Status serves as both an aspirational tool for members and an extremely powerful engagement metric for employers. Status measures meaningful, ongoing program engagement, as year-long participation is required to reach higher levels of status (e.g., it takes an average of 3.5 months to reach Silver Status and 7.2 months to reach Platinum each year). Status unlocks a variety of incentives, further motivating initial and long-term engagement.

With regard to a client-specific incentive strategy, the Vitality Contribution Manager (VCM) incentive tool allows the District to set your own requirements and provide rewards (premium reductions, HSA contributions, vacation days, etc.) for members. It is also an excellent opportunity to help offset the cost of — and possibly create a surplus from — funding of the wellness program. The tool is highly flexible and configurable, giving the District a vast range of options that can vary for new hires, benefit enrollment status and more. VCM criteria can be tied to:

- **Activity** (Vitality or District-specific—e.g., HRA and/or biometric screening completion);
- **Biometric outcomes** (achievement of specific in-range biometric measurements or exhibiting improvement based on a particular percentage or number of points); or
- **A combination of the two** (blended approach through Vitality Status and/or specific activities and outcomes).
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Vitality will provide member-level reporting to the District on who has met your specific criteria, which the District may use to fulfill the incentive of your choosing.

Additional reward options offered through the Vitality program include:

- **The Mall**: gives members the opportunity to spend their Vitality Bucks (earned through Vitality Points) on products and gift cards from some of the leading consumer brands in the world (Amazon.com, Fitbit, Hotels.com and many more), ensuring that each member can work toward a reward that is meaningful to them. Bucks can be spent immediately upon being awarded, addressing the need for instant gratification.

- **Earn Apple Watch**: is the result of a groundbreaking global partnership between our ultimate parent company, Discovery, and Apple, in which the amount members pay for the Apple Watch is solely based on their level of engagement in physical activity. Targeting loss aversion (not engaging = literal loss of money), the desire for the latest and greatest technology, gamification and the global epidemic of physical inactivity, Vitality has seen tremendous results in both increased physical activity and overall program engagement across all health risk groups.

- **Vitality Active Rewards**: accessed through our free smartphone app, gives members dynamic weekly physical activity goals and a spin of an online wheel for Vitality Points or e-gift cards each week an activity goal is met.

- **Gym and Wellness (weight loss and smoking cessation) Rebates**: improve members' access to the well-being resources available to them.

- **Fitness Device Subsidies and Mall Gift Card Coupons**: which can be tied to specific engagement criteria.

As a best practice, we recommend offering the mall, Earn Apple Watch and Vitality Active Rewards combined, as these options together drive weekly, monthly and year-over-year engagement, as well as target both physical activity and overall program engagement.

**Included at no additional fee** are Vitality Squares and HealthyFood. **Vitality Squares**: a monthly online game similar to a virtual scratch-off jackpot, has been proven to cause spikes in program activity at the beginning of each month, driving members back to the website (gift cards won through Vitality Squares are funded by Vitality). Additionally, our HealthyFood program provides discounts on healthy purchases through Walmart (funded by Vitality), as well as Vitality Points for healthy purchases at over 70 grocers nationwide.

Our history and research allow us to understand how to leverage incentives better than anyone in the industry. With a variety of reward options and configurable incentive structure, Vitality can help the District create an incentive design that aligns with your overall budget and goals, while also targeting specific population characteristics and engagement objectives.

41) Please attach a list of reports that are available and any add hoc reports that may or may not have a cost. Please include a report cost schedule.

A full list of available employer reports, which are included in the PEPM administration fee, are provided in the following question. Our actuarial and strategy teams can support the District in creating ad-hoc/customized reporting, subject to HIPAA privacy requirements. Typically, we do
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not receive many custom reporting requests due to the robust nature of our reporting package; however, most often, we see custom reporting requested by the client as a way to pinpoint new engagement avenues and opportunities (e.g., an age and gender banded custom report). Ad-hoc reporting is available at a rate of $200/hour.

We have attached samples of some of our core reports that are delivered to employers: monthly Activity Report, quarterly Health Risk Report and annual Summary Engagement and Health Risk Report. We are happy to provide additional reporting samples as needed.

42) What is the report frequency and will the District be able to generate reports independently?

We provide a variety of reports with a focus on gleaning actionable insights from the data gathered by our program. These reports give administrators a comprehensive view of the state of Vitality and maximize ongoing strategic planning and program management between the employer and their Account Manager.

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
<th>FREQUENCY</th>
<th>AGGREGATE VS. MEMBER-LEVEL</th>
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</thead>
<tbody>
<tr>
<td>Early Insight Reports</td>
<td>Demographic Insight, early engagement and risk data, identification of breakage points in member journey, highlights on risk and engagement profiles by location</td>
<td>Pre-Launch to Month 2</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Activity Report</td>
<td>Monthly participation numbers by activity type and category, Vitality Status distribution and earned Vitality Points, comparisons with prior month and prior year engagement, monthly activity trends for the prior two-year period</td>
<td>Monthly</td>
<td>Aggregate</td>
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<tr>
<td>Member Status Report</td>
<td>HRA &amp; biometric screening completions, web registrations and Vitality Status level for the current or prior program year</td>
<td>On-demand</td>
<td>Member-level</td>
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<tr>
<td>Activity Summary Report</td>
<td>Summary of selected Vitality activities (e.g., online education, physical activities) during selected months and program-year-to-date for selected months</td>
<td>On-demand</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Website and Mobile App Login Report</td>
<td>Dates of the first and last logins for website and mobile app during a selected date range</td>
<td>On-demand</td>
<td>Member-level</td>
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<tr>
<td>Challenge Reports</td>
<td>Team and member-level data for each challenge on participation and progress, list of existing challenges, challenge status and team and member leaderboards. Data is as recent as the previous day.</td>
<td>Varies</td>
<td>Member-level</td>
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<tr>
<td>Health Risk Report</td>
<td>Current program year view of health risk and perception of well-being within the population, including Vitality Age differential, HRA &amp; screening participation, activity completion rates by risk category, identified risks and chronic</td>
<td>Quarterly</td>
<td>Aggregate</td>
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<tr>
<td>TYPE</td>
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<td>FREQUENCY</td>
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<tr>
<td>Operations Report</td>
<td>conditions and book of business comparison</td>
<td>Quarterly</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Summary Engagement and Health Risk Report</td>
<td>Vitality's book-of-business service level metrics on customer service, call center performance and website availability for the current and previous three quarters</td>
<td>Annual</td>
<td>Aggregate</td>
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<tr>
<td>Estimated claims-based savings analysis</td>
<td>Previous program year view and year-over year views of key engagement measures over time (e.g., HRA &amp; biometric screening completion, verified workouts, Status transitions), risk results, book of business comparisons, cohort risk transition analyses, productivity metrics, summary of pre-effective biometric data and risk transitions (if applicable)</td>
<td>Available annually upon request</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Claims Savings Reports</td>
<td>Utilizing the employer's data on engagement, risks and average per-member-per-month allowed claims amounts, as well as Vitality’s actuarial research and methodology, Vitality estimates annual savings for the employer's population</td>
<td>Available at end of three-year contract term*</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Claims-based savings analysis (available to groups with at least 3,000 employees)</td>
<td>Utilizing the employer's health claims data, Vitality estimates savings for the employer's population. Depending on the available data, this report may include claims trends, estimated savings, ROI calculations and additional engagement and/or risk transition analyses.</td>
<td>Available annually upon request</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Vitality Contribution Manager Report</td>
<td>Current program year view of details specific to the client's incentive plan containing reward eligibility information based on the appropriate criteria</td>
<td>Weekly, biweekly or monthly</td>
<td>Member-level</td>
</tr>
<tr>
<td>Liability Report</td>
<td>A rolling twelve-month view of outstanding reward liability across members (unredeemed Vitality Bucks)</td>
<td>Monthly</td>
<td>Aggregate</td>
</tr>
<tr>
<td>Rewards Report</td>
<td>Previous month view of reward earning and redemption information, including the retail value of the Vitality Rewards each employee has received</td>
<td>Monthly</td>
<td>Member-level</td>
</tr>
</tbody>
</table>

* Also available at end of program years 1 and 2 for an additional cost.
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As previously described, through the Employer Portal, the District can log on — at any time — and access/generate the following reports (described in the table above) on the indicated frequency:

- Member Status Report (on demand)
- Activity Summary Report (on demand)
- Website and Mobile App Login Report (on demand)
- Activity Report (monthly)
- Liability Report (monthly)
- Rewards Report (monthly)
- Health Risk Report (quarterly)
- Operations Report (quarterly)
- Vitality Contribution Manager Report (weekly, biweekly or monthly)
- Challenge Reports (varies; data is as recent as the previous day)

43) Does your firm have an ROI analysis on the services you are suggesting for us?

Yes. To provide accurate savings measurements that incorporate well-being engagement, a population must have statistically credible data - both in entirety and in various cohorts. Due to natural fluctuations in claims, minimum credibility requirements include a sizeable membership base and consistent enrollment. If those requirements aren't met, natural fluctuations in claims may appear to be savings or additional costs. As such, for clients with more than 3,000 employees, we offer a statistical claims-based savings analysis at the end of the third program year that includes a return-on-investment (ROI) estimate as part of the annual report, as long as there is sufficient data to provide this estimate. In the absence of sufficient data, ROI estimates may be provided based on engagement using our actuarial savings model. The cost for this analysis is included in the PEPM administration fee.

44) Currently a majority of the employees in the District have their payroll contribution toward their health insurance indexed to their participation in wellness events. If they participate, then the employee pays less for his or her benefits. Identify wellness events and activities that can serve as a trigger for employee participation by which the District can credit the employee. What programs or services do you offer by which the District can measure the employees' participation? How are you HIPAA compliant – what procedures are in place to comply with this statute?

As previously described, regarding a client-specific incentive strategy that can serve as a trigger for employee participation by which the District can credit the employee, the Vitality Contribution Manager (VCM) incentive tool allows the District to set your own requirements and provide rewards (premium reductions, HSA contributions, vacation days, etc.) for members. The tool is highly flexible and configurable, giving the District a vast range of options that can vary for new hires, benefit enrollment status and more. VCM criteria can be tied to:

- **Activity** (Vitality or District-specific—e.g., HRA and/or biometric screening completion);
- **Biometric outcomes** (achievement of specific in-range biometric measurements or exhibiting improvement based on a particular percentage or number of points); or
- **A combination of the two** (blended approach through Vitality Status and/or specific activities and outcomes).
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Vitality will provide member-level reporting to the District on who has met your specific criteria, which the District may use to fulfill the incentive of your choosing.

Sample Vitality Contribution Manager Strategies

One sample multi-year strategy for the District’s incentive design could involve:

Year 1 – Incentive based on HRA and biometric screening completion

Year 2 – Incentive based on HRA and biometric screening completion, plus achievement of Silver Vitality Status

Year 3 – Incentive based on HRA and biometric screening completion, plus achievement of Gold Vitality Status

In this strategy, in the second and third years, Vitality Status – weaving together a wide variety of activities – drives long-term engagement with the well-being program as the area of primary importance. This helps promote deeper individual engagement each year.

A multi-year outcomes-based strategy can also be customized to the District’s needs. For example, if tobacco cessation is its top health priority for employees, but a gradual progression to incorporate additional outcomes is desired, a strategy could involve:

Year 1 – Incentive based on demonstration of tobacco-free status (or reasonable alternative standard)

Year 2 – Incentive based on demonstration of tobacco-free status and BMI in range (or reasonable alternative standard)

Year 3 – Incentive based on demonstration of five key biometric outcomes (glucose, BMI, blood pressure, cholesterol, tobacco-free) in range (or reasonable alternative standard); tiered incentive payout structure available

This strategy allows a client to step gradually into an outcomes-based structure, with increasing emphasis on additional health risk factors each year. The Vitality program is designed to support outcomes-based structures like the one above with a highly configurable, fully ACA-compliant program design and comprehensive employer reporting package.

We consistently find that a Status-based VCM design drives greater engagement for the same maximum incentive value. As previously described, members achieve higher Vitality Status based on verified activities completed and total Vitality Points earned each year. Members of any age, health, or fitness level can complete a multitude of different activity combinations to increase their Status level. Higher Vitality Status unlocks enhanced incentive opportunities, such as a greater reduction in their benefit costs and bonus Vitality Bucks to redeem on a variety of incentive options as a member reaches Silver, Gold, and Platinum Status levels. This robust measurement of health engagement is:

- equitable (HIPAA, ACA and GINA compliant);
- simple as it is tied to an incentive for a single streamlined program;
- aspirational because members are continuously striving to achieve a higher status level;
- competitive because it encourages camaraderie and competitiveness between members;
- and finally, optimized because it is actuarily-calibrated for ROI.
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Measuring Employee Participation

Vitality provides a comprehensive reporting package that clearly illustrates participation/engagement, clinical risk transitions, and financial impact in a graphical, easy-to-understand format that can be presented to the District's leadership team. Please see question 45 for additional details and sample reporting screenshots.

Our Monthly Activity Report is provided for discussions around participation and engagement. This report includes:
- Verified participation numbers by activity type and category
- Vitality Status distribution and earned Vitality Points
- Comparisons with prior month and prior year program engagement
- Monthly activity trends for the prior two-year period
- Supplemental report with branch and reporting attribute summary data
- Detailed branch or reporting attribute reports available

HIPAA Compliance

Vitality and all partners used to deliver the program are compliant with all HIPAA, GINA, DOL, and similar standards and regulations. All aspects of the program are designed with personal data protection as the primary requirement. Prior to hiring, all employees must pass an extensive background check. Once hired, prior to having access to a key card, computer, or any network, all employees must attend HIPAA and HiTech training as well as an orientation which more thoroughly covers all of Vitality’s policies and procedures. We enforce our policy via managers, HIPAA audits and annual revision training. Any third party or contractor with access to member information must also attend training.

Vitality’s HIPAA Compliance Committee works to ensure we are completely compliant with the law, and continues to take a conservative approach to ensure compliance and comfort with both our clients and members. More importantly, Vitality works to be completely transparent to our members regarding what information is being collected, who it is being shared with and why. This can all be found in our Terms and Conditions and Privacy Statement, which must be viewed and agreed upon prior to use of the program.

We also have a Privacy and Security Committee and Security Officer who are responsible for ensuring that:
- Policy decisions made by the HIPAA Committee are communicated;
- A process is implemented whereby Privacy and Security risks and breaches are identified and documented appropriately and that action plans are implemented to manage risks;
- A monitoring program aimed at monitoring Privacy and Security risks within The Vitality Group is established and maintained throughout the business;
- An awareness and training program is implemented;
- Business is informed of technological developments related to data Privacy and Security,
- Liaising with business to ensure that emerging threats are managed timeously;
- All risks and Privacy and Security breaches are reported to the HIPAA Committee;
- Data Privacy and Security related policies and procedures are implemented, updated as required and communicated to all stakeholders.
Wellness Request for Proposal

45) Would you be able to provide services that could track employee participation in wellness activities? Be able to create a reporting mechanism to Human Resources on a regular basis (e.g. quarterly, monthly, etc.)? Please explain in detail how you can deliver this service.

*We are looking for a partner who will assist with a points accumulation tracking system, pursuant to our labor negotiations. We will require an administrative tracking system.

Yes. Incentive management, tracking and fulfillment are included as part of our core services. The dashboard a participant encounters during login gives a "snapshot" of how many Vitality Points earned, their current status, and also how many points they are from getting to the next Vitality Status level. In addition, members can easily click to their Vitality Points Statement for a breakdown of how Points/Status were earned via activity type, or a detailed page – "Employer Incentive Plan" – is available, which highlights the specific requirements that member must achieve to earn the employer’s premium adjustment (if applicable) and progress towards meeting those requirements.

The following screenshot illustrates the member's Points Statement:

![Points Statement Screenshot](image-url)
Wellness Request for Proposal

The following screenshot illustrates the Employer Incentive Plan page that can be customized for your population.

**INCENTIVE OVERVIEW**

Your message to your employees and their partners goes here. Here is an illustrative example.

Above and beyond your personal reasons for improving your health, we want to give you some more.

1. Earn up to $250 off of your annual medical premiums when you complete the Vitality Health Review and participate in a Vitality Check
2. Earn a chance to win up to $250 towards next year's insurance premiums for maintaining a healthy weight or making improvements towards a healthier weight

Your requirements are listed below. Vitality makes earning Health Incentives easy.

**VIEW REQUIREMENTS**

Complete the below requirements to receive the maximum incentive

- Complete the Vitality Health Review
- Complete your Vitality Check screenings

Vitality provides our clients a comprehensive reporting package in a graphical, easy-to-understand format that can be presented to the District's leadership team. These reports provide the foundation for strategic planning and program management between the employer and their Account Manager, and contain data on the following areas:

- Member engagement and verified activity completion
- Member health risks and transition over time
- Behavior change milestones
- Claims savings
- Incentive management
- Service-level operations metrics

Our reports track and evaluate population health behaviors, risks, and status over time. The reports also identify and stratify the prevalence of risks and chronic conditions of the population. We measure goal selection, activities contributing toward a goal, goal achievement, and maintenance. Almost all activities and outcomes are validated.

Your Account Manager, coming from a team of experts certified in the field of corporate wellness or health education, leverages these reports on an ongoing basis and will proactively work with you to adjust your program strategy as the evidence and data dictate, guiding the
Wellness Request for Proposal

strategy of your program in real-time and optimizing your investment. Through this approach, we ensure that every dollar spent with us drives more utility and value than with any other company in the well-being space. We create shared value based on what is important for each individual client, supported by our core purpose of improving your population's health.

The following pages contain illustrative examples of the reporting the District will receive. The District's monthly Activity Reports will show the usage of key activities such as HRA completion and other Vitality Points-earning activities. For example:

**OVERALL EMPLOYEE PARTICIPATION (CURRENT PROGRAM YEAR)**

- 82.5% of current employees completed a Vitality Activity
- 66.8% of current employees completed a Vitality Health Review
- 42.4% of current employees completed a Biometric Screening

35.4% of current employees completed a Vitality Health Review and a Biometric Screening

**VITALITY POINTS OVERVIEW**

February 2015

- 4,753,295 Points Earned

Current Program Year

- 11,340,700 Points Earned

The District's Quarterly Report will show annual and quarterly trends in risk prevalence for the full array of major lifestyle risk factors, as well as the verified activities related to each factor. For example:

- 79% of members currently have an elevated level of Overall Risk

+0.3% since last quarter

+4.0% since last year

76% 70% 79% 79%
Wellness Request for Proposal

<table>
<thead>
<tr>
<th>Key</th>
<th>Low Risk</th>
<th>At Risk</th>
<th>High Risk I</th>
<th>High Risk II</th>
</tr>
</thead>
<tbody>
<tr>
<td>average activities per active member</td>
<td>% of active members completing activities</td>
<td>60%</td>
<td>76%</td>
<td>56%</td>
</tr>
<tr>
<td></td>
<td>Average Number of Activities</td>
<td>162.4</td>
<td>89.3</td>
<td>125.5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physical Activities</th>
<th>Light Workouts</th>
<th>Standard Workouts</th>
<th>Advanced Workouts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Completing Activities</td>
<td>Average Number of Activities</td>
<td>% Completing Activities</td>
</tr>
<tr>
<td>Light Workouts</td>
<td>26%</td>
<td>68.3</td>
<td>35%</td>
</tr>
<tr>
<td>Standard Workouts</td>
<td>46%</td>
<td>126.0</td>
<td>51%</td>
</tr>
<tr>
<td>Advanced Workouts</td>
<td>25%</td>
<td>26.5</td>
<td>27%</td>
</tr>
</tbody>
</table>

Geographical trends are also included, focused around pre-identified branches, to help us target interventions to sub-populations, as shown below:

<table>
<thead>
<tr>
<th>Biometric Risk Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>BMI</td>
</tr>
<tr>
<td>bMi</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Branch Name</th>
<th>Total</th>
<th>Elevated</th>
<th>Total</th>
<th>Elevated</th>
<th>Total</th>
<th>Elevated</th>
<th>Total</th>
<th>Elevated</th>
<th>Total</th>
<th>Elevated</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRANCH A</td>
<td>296</td>
<td>53%</td>
<td>179</td>
<td>26%</td>
<td>166</td>
<td>28%</td>
<td>151</td>
<td>8%</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>BRANCH B</td>
<td>242</td>
<td>54%</td>
<td>156</td>
<td>31%</td>
<td>89</td>
<td>25%</td>
<td>85</td>
<td>0%</td>
<td>16</td>
<td>0%</td>
</tr>
</tbody>
</table>

From this vantage point, the District can see clearly the impact the program is having on risk, and where to focus ongoing effort.

The Annual Report builds on this information to provide an overview of program-year engagement, risk results and changes over time, including key engagement metrics, book-of-business benchmarking, risk results over time, cohort risk transition analysis and summary of pre-effective biometric data. For example:

![Member Participation Chart]

- PY 1: 55.4% (VHR), 32.6% (Vitality Check)
- PY 2: 63.4% (VHR), 41.9% (Vitality Check)
- PY 3: 67.1% (VHR), 48.9% (Vitality Check)
Wellness Request for Proposal

Combined Risk Factor Analysis

Reduction in Risk Factors
(n = 1,800)

Expected natural migration is equal to a 1% deterioration in risk groups.
As demonstrated above, there was a net improvement of 7.5% in risk groups.


Monthly Activities* per Employee

Average Monthly Activities* per Employee

<table>
<thead>
<tr>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.41</td>
<td>3.21</td>
<td>4.77</td>
</tr>
</tbody>
</table>
In addition, the District will receive a claims-based savings analysis at the end of the third program year. Depending on the available data, this report typically includes claims trends and projections, estimated savings, and ROI calculations.
46) Describe the cost associated with those programs split out by a per employee per month schedule, per member per month schedule and an annual cost.

- Please identify any pass-through costs
- Please estimate potential savings

Below and on the following pages we have provided tables listing our core fees, miscellaneous/optional fees and our pre-integrated partner fees. Because it is our understanding that the District does not want to include spouses on the program, the PEPM price and PMPM price are identical. Should you wish to include spouses, the year 1 PEPM administration fee increases to $3.65 PEPM. If spouses are included, the PEPM administration fee is applied to the number of employees only and not the spousal count.

These fees, as well as additional information on Vitality’s program offerings, are included in the attached “Vitality Proposal for RPS 205”.

**CORE FEES**

<table>
<thead>
<tr>
<th></th>
<th>Unit Cost</th>
<th>Fee Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation Fee⁵</td>
<td>$9,750</td>
<td>One time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Biometric screening</td>
</tr>
<tr>
<td></td>
<td></td>
<td>planning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Launch communication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>strategy and introduction</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to the Communications</td>
</tr>
<tr>
<td>Administration Fee for</td>
<td></td>
<td>Employees Only</td>
</tr>
<tr>
<td>3,100 eligible employees⁶</td>
<td>$3.25</td>
<td>Including Spouses/Partners</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Per Employee Per Month (PEPM) Year 1 Annual increase capped at CPI-U⁷</td>
</tr>
</tbody>
</table>

|                        |                          |                          |
|                        |                          |                          |
| Online well-being platform |            | Incentive design,         |
| Actuarially-driven reporting |            | management and            |
| Suite of assessments |                          | fulfillment Online health |
| including Vitality HRA |                          | education and interactive |
| Vitality Today smartphone app, including gym “check-in” technology |            | tools                     |
| Configurable platform with ability to include client-specific communications, information and branding |            | Vitality Squares gamification  |
|                        |                          | engagement driver         |
|                        |                          | Healthy Kids program      |
|                        |                          | Vitality HealthyFood network|
|                        |                          | Robust communications     |
|                        |                          | package                   |
|                        |                          | Vitality challenges platform|
|                        |                          | with social networking    |
|                        |                          | capabilities              |
|                        |                          |                          |
|                        |                          |                          |

⁵ Three years is our standard contract term. If a shorter contract term is desired, a higher implementation fee will be charged. Contract must be signed or implementation fee must be paid prior to the start of implementation.

⁶ Our pricing is volume-based. If the number of employees changes prior to the time of launch, a different PEPM rate may apply. Additionally, Vitality will require a minimum employee count throughout the contract term, based on the size of the population at launch. Pricing is valid 120 days from date of quote.

⁷ The consumer price index of consumer goods and services of urban households; historically averages around 2%.
Administration Fee Annual Summary

Administration fees after Year 1 are subject to change. During the term of the contract, the Vitality Group will cap the annual renewal increase on monthly membership fees at CPI-U (the consumer price index of consumer goods and services of urban households).

<table>
<thead>
<tr>
<th>Annual Administration Fees (Excludes Year 1 Implementation Fee)</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$120,900</td>
<td>$123,318</td>
<td>$125,784</td>
</tr>
</tbody>
</table>

The calculation for Year 1 is as follows: ($3.25 PEMP) * (3,100 Vitality-eligible employees) * (12 months). Year 2 and Year 3 assume a 2% CPI-U increase per year. Quoted fees do not include costs for the optional/miscellaneous fees below, biometric screenings or optional telephonic coaching.

<table>
<thead>
<tr>
<th>OPTIONAL/MISCELLANEOUS FEES</th>
<th>Unit Cost</th>
<th>Fee Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Manager Travel</td>
<td>Varies</td>
<td>Pass-through cost</td>
</tr>
<tr>
<td>Physician Forms</td>
<td>$3</td>
<td>Per Member Submitting Form</td>
</tr>
<tr>
<td>Single Sign-On (SSO)</td>
<td>$5,000</td>
<td>One time per SSO</td>
</tr>
<tr>
<td>Gateway Integration Platform</td>
<td>Varies</td>
<td>Optional Gateway platform added to administration fee on a PEMP basis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Within Gateway, for any direct data file exchange not in Vitality file format, additional setup costs apply ($5,000 initial setup, $1,500 annual maintenance thereafter). For any direct data file exchange in Vitality's standard format, there are no additional costs. Biometric screening data must be in Vitality's standard format.</td>
</tr>
<tr>
<td>Incentives</td>
<td>Varies</td>
<td>Monthly pass-through cost</td>
</tr>
<tr>
<td>Incentive management, tracking and fulfillment are included as part of our core services. Optional incentives listed below are billed as a pass-through cost as rewards are redeemed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Mall (High, Standard or Low Level)</td>
<td></td>
<td>Wellness Rebates (smoking cessation &amp; weight loss)</td>
</tr>
<tr>
<td>- Vitality Active Rewards</td>
<td></td>
<td>Fitness Device Subsidy</td>
</tr>
<tr>
<td>- Gym Rebate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earn Apple Watch</td>
<td>$0.12</td>
<td>Per Employee Per Month (spouses not included in benefit)</td>
</tr>
</tbody>
</table>
| In addition to the PEMP increase, the District will be billed for each Watch purchaser each month the difference between the maximum monthly payment (e.g., $12.50 for Apple Watch Series 3) and the payment due from the member.
Partner Pricing: Biometric Screenings

We offer integrated onsite biometric screenings, called Vitality Checks®, at a discounted rate through our partnerships with Quest Diagnostics and Clinical Reference Laboratory (CRL). The results are transmitted to Vitality electronically and are directly uploaded into each member’s individual Vitality account, overriding missing or self-reported HRA values. For members who are unable to attend onsite screenings through one of our partners, they will have access to Quest or CRL's expansive national lab network, which is also integrated with Vitality. For a breakdown of what our screening partners offer, and respective per-participant fees, please see below.

Additional screening details are available on page 16 of the attached “Vitality Proposal for RPS 205”.

<table>
<thead>
<tr>
<th></th>
<th>Cost Including Cotinine (Venipuncture)</th>
<th>Cost Excluding Cotinine (Venipuncture)</th>
<th>Cost Including Cotinine (Fingerstick)</th>
<th>Cost Excluding Cotinine (Fingerstick)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quest Diagnostics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onsite</td>
<td>$56.00</td>
<td>$46.00</td>
<td>N/A</td>
<td>$46.00</td>
</tr>
<tr>
<td>Clinic (2,000+ locations)</td>
<td>$56.00</td>
<td>$46.00</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Clinical Reference Laboratory (CRL)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onsite</td>
<td>$46.00</td>
<td>$42.00</td>
<td>$52.00</td>
<td>$49.00</td>
</tr>
<tr>
<td>Clinic (1,350+ locations)</td>
<td>$71.00</td>
<td>$67.00</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Partner Pricing: TrestleTree Coaching

Our pre-integrated partner for chronic condition management and telephonic coaching is TrestleTree. This is an optional component of the Vitality offering. TrestleTree believes that long-term, sustained behavior change is achievable for everyone, regardless of their level of motivation or readiness to change. Please see page 19 of the attached “Vitality Proposal for RPS 205” for additional details regarding TrestleTree's coaching offering.

TrestleTree telephonic coaching is billed on a per participant per month (PPPM) basis. A 10% discount is applied when Lifestyle Management (LM) or Disease Management (DM) are both offered.

<table>
<thead>
<tr>
<th></th>
<th>PPPM Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>LM Coaching Only</td>
<td>$38.00</td>
</tr>
<tr>
<td>LM Coaching (when DM coaching is also offered)</td>
<td>$34.20</td>
</tr>
<tr>
<td>DM Coaching (when LM coaching is also offered)</td>
<td>$40.50</td>
</tr>
</tbody>
</table>

The District will be billed on a per-participant basis at the appropriate LM or DM rate for the type of coaching each participant requires. A “participant” is defined as a Vitality member (employee and/or spouse/partner, if applicable) who has enrolled in the coaching program, and has completed their first coaching call. Monthly billing will occur for as long as that individual actively continues with the coaching program.
An overall monthly minimum fee will apply. Monthly minimum fees based on 3,100 members (spouses not included) are $2,500 if only Lifestyle Management is selected and $2,250 if both Lifestyle Management and Disease Management are selected. Each month the amount billed will be either the monthly minimum, or the monthly participant fees based on actual usage, whichever is greater.

Potential Savings

There are a number of factors that contribute to the savings an employer can receive through their wellness program. Based on a three-year claims analysis we recently conducted, our metrics have shown 12% to 15% claims costs savings per highly engaged member per year.

These metrics reflect the savings an employer can receive through strong member engagement, and Vitality conducted an in-depth statistical analysis on our client base to quantify the impact of different factors on member engagement. In this study, we cover what incentives and employer support actions have the biggest impact on HRA completion, how to optimize program design, and common drivers of engagement that our high-participation populations have found successful. Our study shows that the most significant drivers of member engagement are the use of financial incentives and employer communications. Please refer to the attached "Vitality Engagement Study" to find out more about answers to key questions addressing the success of well-being programs.

---

1 This claims analysis includes 12 groups between 21,000 and 52,000 members; highly engaged measure as Gold and Platinum Status.
47) Please describe any and all performance guarantees that are available.

We will place a total of 20% of our membership and implementation fees at risk and provide the District with the flexibility to determine the appropriate allocation level for each performance standard category. The default allocation is shown below:

<table>
<thead>
<tr>
<th>SERVICE-LEVEL GUARANTEES</th>
<th>20% of our membership and implementation fees at risk</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Implementation:</strong> Meet committed deadlines.</td>
<td>20% of implementation fee</td>
</tr>
<tr>
<td><strong>Timely Reporting:</strong> Monthly report delivered within one month of the end of the reporting period. Quarterly report delivered within two months of the end of the reporting period. Annual report delivered within two months of the end of the reporting period. Service Threshold: 95%.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Website Availability:</strong> Members are able to log into the Vitality website; excludes scheduled maintenance. Service Threshold: 98%</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Call Center Performance:</strong> 80% of calls answered in 20 seconds.</td>
<td>4% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Customer Service Performance:</strong> Customer Service Email &amp; Fax Responses – Response within two business days. Service Threshold: 80%</td>
<td>4% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Participant Satisfaction:</strong> Positive net promoter score. Measured quarterly.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Risk Reduction Outcomes:</strong> Healthcare trend for the engaged population is less than the non-engaged population after three years.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
</tbody>
</table>

48) Please indicate if your firm is willing to place fees at risk if performance guarantees are not met?

Yes. We will place a total of 20% of our membership and implementation fees at risk and provide the District with the flexibility to determine the appropriate allocation level for each performance standard category listed in the previous question.

---

*Guarantee applies for the initial contract term.

*Maximum amount in this category will be limited, based upon incentive construct selected. The client must be able to provide Vitality Group with sufficient claims data to administer the guarantee. The Risk Reduction Outcomes guarantee is only provided to groups with more than 3,000 employees.
49) Please outline for the District what sets your company apart and makes your service offering more effective than other wellness vendors.

Everyone benefits from better health — from individuals to employers to insurers, but healthy is hard. Because healthy is hard, we've seen a transition in focus throughout our industry, from an emphasis on comprehensive health to an emphasis on engagement, culture or tech platform solutions. The industry is leaving employers to have to pick and choose between the various focus areas. That's where Vitality comes in. We're experts in blending smart tech, incentives, and consumer behavioral science to improve health holistically and unlock the outcomes that matter to you. This is done in the following ways:

- **An evidence-based approach** which directly targets major health risk factors. Our program structure, interventions and rewards are designed to ensure we attach value where real behavior change occurs, maximizing the value of our clients' investment. The proven impact of Vitality on health risk reduction and reduced medical spend has been acknowledged by leading business, health and investment leaders around the world.

- **Continued support of the culture of health within an organization through action-oriented, data-driven and insightful tools and human capital.** All of Vitality's Account Managers have received either the Certified Corporate Wellness Specialist® (CCWS) certification or the Certified Health Education Specialist (CHES®) designation. The client and their Account Manager use Vitality's comprehensive reporting as a foundation for ongoing strategic planning and program management. Together, they develop plans to encourage participation in Vitality through: consultative communications strategies, thoughtful multi-year incentive strategy design and proven best practices in health improvement.

- **The breadth of our flexible platform and technological savvy,** which spans an integrated, instantly accessible well-being network and platform that meets both members' and partners' unique needs. Vitality's device-agnostic platform encourages personal goal-setting, and our mobile app allows members to submit activities for points with ease. We provide members with multiple access points and a clear and engaging path to wellness.

- **A foundation built on a tradition of innovation,** bringing very unique and impactful products to market like: HealthyFood; our collaboration with Apple through our Earn Apple Watch offering; our actuarially-calibrated Vitality Age, Points and Status design; and versatile incentive platform.

For 20+ years, we've focused on one enduring core purpose: making people healthier and enhancing and protecting their lives. This has led us to tremendous recognition and partnership with some of the smartest companies and insurers around the globe, through which we now touch the lives of 7 million people every day across operations in 15 countries.
At Vitality, we're focused on optimizing our clients' investment in improved health, while remaining grounded in consumer behavioral and clinical science, data, and outcomes that prove Vitality works (as shown in the metrics below).

<table>
<thead>
<tr>
<th>INCREASED ENGAGEMENT</th>
<th>CLAIMS</th>
<th>CULTURE</th>
<th>OVERALL HEALTH &amp; WELL-BEING</th>
</tr>
</thead>
<tbody>
<tr>
<td>78%</td>
<td>12-15%</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Increase in population reaching high level of Vitality Status*</td>
<td>Claims cost savings per highly engaged member per year**</td>
<td>Of members say Vitality improves their workplace culture***</td>
<td>Of members say Vitality improves aspects of their health and well-being***</td>
</tr>
</tbody>
</table>

*Three-year Status analysis
**Three-year claims analysis, includes 12 groups between 21,000 and 52,000 members, highly engaged measure at Gold and Platinum Status
***2017 Happiness Calibrator Vitality Member Survey

REQUEST FOR REFERENCES:

Please provide the names and contact information of three companies of similar size and industry as the District that utilize your services.

Out of respect for our clients' time, we would prefer to provide client contact information when a buying decision is imminent (i.e., during the finalist stage of the RFP process). We will be happy to arrange private discussions with Vitality clients at that time.
McKesson Case Study:
C. Everett Koop Award Winner 2015

About Vitality:
We see the wellness industry from every angle, providing solutions that turn shared risks into shared value. As pioneers in our industry, our commitments to the advancement of the health and well-being of our clients’ workforces have continued to make significant strides. Our success has been measured and recognized, and includes clients that have been recognized for their successful programs through the prestigious C. Everett Koop Award: two winners and one honorable mention within the last five years.

Vitality delivers a solution that encompasses:

- An evidence- and actuarial-based approach directly targeting major health risk factors. The proven impact of Vitality on health risk reduction and reduced medical spend has been acknowledged by leading business, health and investment leaders.

- An engaging and interactive program, built on behavioral models, which puts members on a path toward improved self-esteem and greater rewards.

- Technological savvy that includes our integrated, instantly accessible wellness network and a flexible platform that meets both members’ and employers’ needs.

- Robust employer support, including insightful reporting on actionable metrics, implementation through ongoing strategy development, a fully-supported Champ program, numerous communication modalities and more.

About McKesson:
Founded in 1833, McKesson is the oldest and largest healthcare services company in the nation and plays an integral role in healthcare. McKesson serves more than 50 percent of American hospitals, 20 percent of physicians and 100 percent of health plans, and as the largest pharmaceutical distributor in North America, they deliver one-third of all medications used there every day. Today, McKesson ranks in the top 15 of the FORTUNE 500 list of companies, with more than $137.6 billion in annual revenue, employing more than 37,000 workforce members across the country.

McKesson Members (2012 - 2014)

- 51 billion steps and more than 25.6 million miles
- 6.3 million total activities recorded (2011-2014)
- 85 more healthy events in 2014 than in 2011
- 159,994 Weight Watchers meetings and a net weight loss of 24,759 lbs

"The culture at McKesson has always been about health"
- Gerri Burruel, VP, Benefits
Action

In 2011, McKesson partnered with Vitality to enhance their existing wellness offering by integrating into Vitality's comprehensive program, which utilizes behavioral economic strategies to drive member engagement in physical activity and improve other modifiable health behaviors. Vitality works with McKesson on an ongoing multiyear strategic plan that has continued to motivate and engage members in healthier lifestyles, leading to better health outcomes and reduced cost. This included moving to an incentivized and tier-based wellness approach and a migration to the Vitality comprehensive online portal and mobile platform.

Vitality's dynamic platform allowed integration with existing partner vendors as well as the inclusion of customized communications to further enrich the member experience.

McKesson worked closely with their Vitality Wellness Strategy Manager (WSM), a designated resource who works side by side with - and empowers - clients to maximize the health and productivity of their workforce. Vitality's WSM worked with McKesson to continually find ways to encourage engagement in the program.

McKesson leveraged monthly, quarterly and annual actuarially driven reporting from Vitality to gain a comprehensive view of their Vitality program's current state. In collaboration with their Vitality account team, McKesson was able to define and maximize ongoing strategic planning and program management.

McKesson created powerful strategies, incentives and rewards to drive engagement, leveraging Vitality's expertise in behavioral economics to keep members engaged. These strategies, incentives and rewards consisted of:

- **Vitality Points**: McKesson leveraged Vitality's ability to administer participatory and outcomes-based incentives to encourage engagement. Members were awarded Vitality Points through a wide array of activities and challenges, including (but not limited to) completion of the health risk assessment, verified workouts, biometric screenings, corporate challenges, healthy eating and health education courses/modules. Vitality Points are converted into Vitality Bucks, which McKesson members can redeem for Amazon.com, Whole Foods and iTunes gift cards as well as fitness devices. This allows for immediate gratification resulting from engagement in the wellness program.

- **Vitality Status as an incentive**: More points means higher status. Starting at Bronze and moving up to Silver, Gold, and Platinum, McKesson used Vitality Status to incentivize members and provide them easy insight into their own health progress. McKesson used compelling incentives at every step, this included receiving incentives for reaching higher levels of Vitality Status.

- **Vitality HealthyFood Program**: McKesson offered this one-of-a-kind healthy food program to their members through Vitality, whereby they are able to achieve up to 10 percent savings or Vitality Points on healthy food purchases at participating stores.

- **Vitality Champ Network**: In collaboration with Vitality, McKesson established a Vitality Champ network of more than 200 employees, whereby Champs at McKesson ignite and maintain a culture of wellness at each worksite and inspire others to do the same. Vitality Champs at McKesson are provided ongoing support on how to effectively organize, communicate, engage and execute ongoing health competitions and challenges to continue to engage members in the McKesson program.

- **Subsidized Activity Tracker**: Administered through Vitality, McKesson offered subsidized pedometers to their members and partners allowing for verifiable activity tracking integrated with the Vitality web and mobile platforms.

- **Vitality Challenges**: McKesson leveraged Vitality's Challenges Platform to run 85 more corporate fitness challenges in comparison to their program in 2011. These challenges have resulted in significant increases in the percent of active days members experienced and the average daily steps taken. These challenges focused on activities integrated into the Vitality program, igniting increased interest and commitment to McKesson's wellness offering.

Additional strategies, incentives and rewards included: weight loss programs, smoking cessation programs and gym membership rebates and subsidies.
Results
The impact of McKesson’s “You. Even better” program in collaboration with Vitality on healthcare expenditure was evaluated by an independent third-party research group at Harvard University’s T.H. Chan School of Public Health.

Throughout the three years of the program offering, McKesson experienced improvement across several impactful health categories. These included:

- $4.7 million dollars in medical cost savings
- 9% risk reduction for lifestyle and biometric-driven risks
- 92% increase in engaged adult participant levels
- 23% increase in verified workouts
- 39% of members in 2014 reaching Gold or Platinum Vitality Status compared to 12% in 2012
- 31% registered for the Vitality HealthyFood Program in 2014
- 3.65% increase in on the job performance, from 81.69% to 85.34%

McKesson’s strategies and results have been nationally recognized by their winning the prestigious C. Everett Koop National Health Award, which is in recognition of outstanding worksite health promotion and improvement programs. The C. Everett Koop National Health Award required employers to be able to document results, both in terms of health improvement and economic impact.

Although McKesson’s focus is on improving health, they are pleased to see from independent assessments that early savings exceed program investment, without monetizing performance improvements. Third-party focus group results showed McKesson’s wellness initiatives significantly enrich the overall benefits offering and corporate culture.

I love setting challenging goals and working toward them. Vitality allows me to do that to improve my health, so it’s very motivating and addictive.”

- Doris, McKesson Employee
Orthollinois is a private sub-specialty orthopedic physician owned practice, based in northern Illinois. The company has 400 staff members, located onsite across their four practice locations and three physical therapy facilities. The Vitality program is currently available to all full and part-time employees.

Vitality spoke with Anna Garrison, Marketing Communication Coordinator, about their engagement in the Vitality program and how their office-based challenges are helping improve engagement levels among employees, old and new.

How has Vitality taken your program to the next level?
Vitality has really helped form a structure. It’s provided a platform to encourage active participation, education and incentives to help our employees live healthier lives.

Why did you decide to host a VHR Challenge?
Our program year renews in March; however, our on-site Vitality Checks are not until October. We wanted something that would excite and engage employees now and last throughout the year.

How did you set up the challenge?
We wanted to try and engage as many employees as possible. We assigned each employee, including senior-level managers and physicians, to a team. Teams were made up of 15 employees. In order for teams to win, all team members needed to complete their VHR during a two-week time-frame.

Did you offer any prizes?
Everyone who participated received 100 Vitality Points. Teams where all members completed their VHR received an additional 250 Vitality Points. We wanted enough points to make the challenge enticing for staff to participate, but not offer more points than a higher achieving activity, such as a 5K run.

How did you communicate the challenge?
We started communicating the challenge a month before it began. It was announced at staff meetings, posters were displayed around the offices and emails were sent. We used both triggered and platform emails to ensure employees had all the details. During the challenge, regular emails were sent to encourage staff to take their VHR and check other teams’ status.
"We didn’t have a wellness culture before Vitality was introduced”

How did the challenge end?
The results were great! We had a total of 24 teams complete the challenge, with five winning teams reaching 100% completion of their VHR. Organization-wide, 85% of employees completed their VHR during the two-week period the challenge was active. This was a huge increase from the last program year, when VHR completions were below 50%. We were extremely excited by this increase in engagement.

What were your employees’ reactions to the VHR challenge?
The employees who participated were excited to have a new way to engage with Vitality and earn points. The challenge also introduced employees to Vitality who hadn’t been active before. It spread excitement throughout the organization and gave the opportunity for co-workers to interact with different departments and office locations.

Do you have plans to run additional challenges?
Yes. We are currently setting up a nutrition course challenge to launch in two weeks. If employees complete a nutrition course during the defined period, they will receive an additional 100 Vitality points.

What results are you most proud of?
We wanted to use the challenge to help engage employees in the new program year. We definitely succeeded, and were able to have employees participate who were new or hesitant to use the program. Furthermore, it increased engagement overall as a result.

What were some of your engagement drivers before challenges?
Our main engagement drivers have been to communicate one aspect of the Vitality program to employees each month. We also encourage employees to participate in 5K runs. As a company, we sponsor some 5K events, so we offer our employees free entry. There is an internal running group, coordinated by staff members, encouraging engagement and offering Vitality Points for attended sessions. Employees also have access to on-site Vitality Checks. After these Vitality Checks, we see an increase in interest in Vitality.

What’s been your greatest challenge?
Engaging employees. Many are hesitant to participate because they are worried about the time and commitment. We explain that most Vitality Point-earning activities are things they are doing already. We communicate the ease of the program, such as setting up/linking your Fitbit and Partner Health Clubs. We also try to communicate that there are other ways to engage and earn points, such as the many online tools that are available.
"Our VHR challenge succeeded in engaging employees who were hesitant and new to the program."

Is there anything else you’d like to share about your experiences with Vitality?
The program has been great and definitely an added benefit to our company. Our employees have been able to engage and live healthy lives.
Baylor College of Medicine Case Study:

Healthiest 100 Workplaces in America

Congratulations to Vitality client, Baylor College of Medicine, on their Top 5 ranking of the Healthiest 100 Workplaces in America, an award that honors employers who blaze the path to a healthy workplace. Baylor College of Medicine (BCM) is an established leader in health sciences education, research and patient care. Their wellness program, BCM BeWell, is a reflection of their long standing commitment to improving the health of their employees. Their keen focus on employee health has resulted in their being ranked in the Top 10 healthiest workplaces in each of the past three years. The award requires employers to show meaningful measurement and impact on six essential values:

Vision, Culture & Engagement, Learning, Expertise, Metrics and Technology.

Baylor College of Medicine's combination of healthcare expertise, focus on wellness at the forefront of employees' lives and collaboration with the Vitality program, has delivered tremendous results in building a culture of health throughout the college.

Leveraging the Vitality and BCM BeWell program drives engagement that leads to significant improvement in health risks across BCM's population. Some of the key strategies they deploy are:

**Vitality Challenges:** BCM uses challenges throughout the year to drive engagement in physical activity, assessment completions and other health-related initiatives. BCM conducts annual Steps Challenges to encourage its members to engage in physical activity. BCM challenges its members to walk the equivalent distance in steps to places around the United States. For example, in 2015, members were challenged to walk the distance from the BCM campus to Panama City, and in 2016 the challenge was to walk from Panama City to New York City. They included multiple checkpoints that encouraged members to participate in the completion of both the Vitality Health Review™, Vitality's version of a health risk assessment, and biometric screenings. BCM motivated employee completion through the use of social recognition by hosting an annual party that included apparel tied to the theme of the NYC Steps Challenge.

An event like this, along with the fun and exciting nature of the challenges, creates further awareness of wellness which leads to increased and sustained engagement.

**BCM BeWell Wellness Champs:** Champs serve as peer-to-peer motivators who help to organize and coordinate wellness initiatives, and help educate and influence their peers to live healthy lifestyles. BCM has recruited and supported more than 70 Wellness Champs to drive awareness and encourage their peers to engage in healthy activities. The Vitality program provides BCM with a designated wellness strategy manager, a certified workplace wellness specialist, to closely partner with BCM in developing short- and long-term wellness strategies. BCM meets with their Vitality wellness strategy manager every quarter to discuss ongoing wellness training and to identify opportunities to leverage BCM or Vitality resources to further engage their colleagues in healthy behavior.

The powerful combination of BCM BeWell Wellness Champs, Vitality wellness strategy manager, and the Vitality program strongly contributes to driving a culture of health and improving health outcomes.
Engagement

- 10.8x increase in average activities per member per month
- 14% increase in Vitality Health Review (HRA) completion
- 24% increase in verified workouts
- 15% decrease in low-engaging population over a three-year period

Risk Reduction

- 21% decrease in blood pressure risk
- 12% decrease in nutrition risk
- 24% decrease in physical activity risk

"I was regularly running and exercising previously, but the fitness tracker I got through BCM BeWell has really helped add motivation. Not only has it led me to ramp up my activities, but it has also had an impact on my family as they all now either have or want trackers of their own. My youngest son, who is fairly active anyway, has made it his goal to surpass my activity and has been successful so far."

Bill Mohr, Director of the Project Management Office Pediatrics Department and BCM BeWell Wellness Champion

"I'm happy to now promote the BCM BeWell opportunities to my colleagues."

Congratulations Baylor College of Medicine! This award is a great testament to the partnership we have, but ultimately its due to the hard work you've done. It's incredibly inspiring.
THE VITALITY ENGAGEMENT STUDY 2017

Employer-sponsored wellness programs continue to grow as employers take aim at the key behaviors that drive the prevalence of chronic diseases, with approximately 79 percent of employers in the United States offering wellness and health improvement programs to their employees. Financial incentives, strength of communication, and workplace culture have all been suggested as key drivers of employee participation. While most workplace wellness programs make use of incentives and further strategies to increase engagement, program designs and options vary widely, leading to varying degrees of effectiveness.

Vitality's previous engagement study released in 2014 explained program design components that helped to quantify the impact of different factors on engagement. To account for changes in innovation, technology and other program updates, Vitality has conducted a new in-depth statistical analysis on our client base to quantify the impact of different factors on engagement. This study aims to help employers optimize program design to achieve the best health outcomes in the most cost-effective way.

In conducting this analysis, Vitality aims to answer a number of key questions facing employers:

1. What incentives and employer support actions have the biggest impact on initial participation as measured by health review completion?
2. What incentives and employer support actions have the biggest impact on sustained program engagement?
3. What do companies with high-employee engagement do differently than the rest?

To demonstrate the impact our analysis has on engagement, we use several components of the Vitality program that include:

VITALITY HEALTH REVIEW™ (VHR), more commonly known as a health risk assessment, is Vitality's interactive online tool that gathers information about each of the 10 modifiable health risk factors and conditions targeted by Vitality, as well as readiness to change, perceived health status and performance. With more than 20 years of experience, and 35 million years of member data collected, our VHR has been developed with a considerable amount of behavioral and clinical rigor. The VHR, in collaboration with biometric screening outcomes (if applicable), provides members with their Vitality Age®, which is a risk-adjusted age that translates everyday behaviors and choices into a personalized health-related age.

NUMBER OF ACTIVITIES MEMBERS ENGAGE IN PER MONTH looks at the number of point-earning activities in which members participate outside of assessments or screenings such as the VHR, biometric screenings and self-reported workouts. Vitality offers members a wide range of activities from which to choose and engage, allowing participation in ways that are important to members personally. Categories of activities include: physical activity, prevention, certifications, online education, challenges, healthy eating and many others.

Having analyzed numerous client attributes across the spectrum of the Vitality program, we developed a model that pinpoints the most significant drivers of engagement. The key modifiable drivers of the model were found to be:

<table>
<thead>
<tr>
<th>INCENTIVES</th>
<th>COMPANY SUPPORT</th>
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<tr>
<td>Vitality Contribution Manager™</td>
<td>Strong communication</td>
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<tr>
<td>Rewards mall</td>
<td>Spouse eligibility</td>
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<tr>
<td>Device subsidy</td>
<td>Vitality Champs' program</td>
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In this study, we look at the marginal impact of each attribute on overall engagement, but in the ideal Vitality setting — in which all recommended attributes are adopted. Additionally, program year plays a factor in the level of engagement, allowing us to chart how engagement varies over time. With the Vitality program, we see that as members become more familiar, their engagement rates increase. By incorporating clients that have been with Vitality for varying lengths of time, we’ve built a model that includes a time factor.

While the precise demographic data of an employer will impact the engagement output, the overall direction and magnitude of the shifts stemming from various Vitality program elements should not vary greatly from the material presented.

VITALITY STATUS® IS AN ACTUARIALY AND CLINICALLY VERIFIED MEASURE to classify and motivate members based on their personal engagement in wellness. Status combines activity and outcomes into one simple and easy-to-understand engagement metric. Status has a proven correlation to mortality and morbidity and healthcare costs. Vitality Status starts at Bronze (lowest engagement level) and moves to Silver, Gold and Platinum status as members earn Vitality Points through engagement. Reaching higher levels of Vitality Status requires long-term engagement in the program. On average, it takes members 3.5 months to reach Silver status, 5.4 months to reach Gold, and 7.2 months to reach Platinum. The following charts demonstrate the direct link between Vitality Status and program impact. There exists a correlation between employee performance and Vitality Status, with higher Vitality Status exhibiting higher satisfaction at work, higher perceived job
performance, and lower reported health-related absences. Vitality Status is risk-adjusted so that regardless of a member's health status or starting point, anyone can reach Platinum status and experience the health benefits associated with long-term engagement.

WHAT INCENTIVES, EMPLOYER SUPPORT ACTIONS AND PROGRAM COMPONENTS HAVE THE BIGGEST IMPACT ON VHR COMPLETION AND AVERAGE ACTIVITIES PER MEMBER PER MONTH?

The first part of the analysis evaluates the importance and impact of individual components, such as program features and supportive company structures on employee participation. Employee participation is defined as the percentage of employees who complete the VHR. In addition to VHR completion percentages, we include the potential impact on engagement in point-earning activities per member per month (pmpm) and progression into higher Vitality Status based on the presence of the incentive, program component or supportive company structure.

A regression analysis was done to construct an explanatory function of employee health review completion and the number of activities members complete per month based on past experience. The regression model allows us to rank each of the factors by the size of their impact. The model looks at each of the program's elements and their impact in year 1 of the program as well as years 2 and 3.

1. Vitality Contribution Manager

Behavioral economics tells us that people are predictably irrational. We know that people over-consume healthcare, because it is free at the point of care, as insurance or an employer is paying for it. The benefit is immediate: You see a doctor and you get treatment. In the case of wellness, the price is immediate, but the benefits could be years down the line. Present bias dictates that people will often make the wrong decision in order to gain immediate gratification, i.e., choosing a cheeseburger over a salad. Incentives play an important role in overcoming these behavioral challenges, guiding people to do the right thing today.

Incentives have been widely used and proven to be effective in driving participation in health-related activities. Kevin Volpp et al. in their article, A Randomized, Controlled Trial of Financial Incentives for Smoking Cessation, published in the New England Journal of Medicine, assessed the impact financial incentives have on getting people to quit smoking. When comparing a financially incentivized group against a control group, the study found that those participants in the financially incentivized group saw higher participation in the smoking cessation program, experienced higher completion rates and had higher short- and long-term cessation rates.

The Vitality Contribution Manager (VCM) is a highly configurable incentive mechanism leveraged for targeted emphasis on specific engagement and/or outcomes criteria. Vitality clients use the VCM as a tool for inspiring members to increase both immediate and longer-term engagement. By setting the requirement for achieving their employer incentive at Silver or Gold Vitality Status, members must engage for longer periods of time and in a variety of different lifestyle improvement activities.
The VCM incentive strategies can be configured in a variety of ways to align with clients' goals. Our analysis looked at the impact specific VCM strategies had on engagement, including:

1. **No VCM strategy**, where the client does not have an incentive strategy in place as part of the program.
2. **Outcomes-based VCM**, where the client aligns the incentive to meeting one or more in-range biometric screening metrics.
3. **Activity-only VCM**, where the client aligns the incentive to completion of a certain activity such as the completion of the VHR or a biometric screening.
4. **Tiered Vitality Status**, where the client aligns different incentives to members based on Vitality Status.
5. **Silver Vitality Status VCM**, where the client aligns the incentive to members achieving Silver Vitality Status or above.
6. **Gold Vitality Status VCM**, where the client aligns the incentive to members achieving Gold Vitality Status or above.

There is a strong correlation between participation in the VHR by employees and whether the VCM is implemented. As reflected in the VHR Completion Rate graph, completion rates of the VHR differ depending on the strategy being deployed. For example, a program that includes a VCM strategy that aligns to biometric outcomes experiences a 46.3 percent participation rate in year 1, which increases to 52.5 percent in years 2 and 3. Comparatively, programs with a VCM strategy aligned to Gold Vitality Status or above experience a 63.4 percent participation rate in year 1 and 69.7 percent in years 2 and 3, a respective 17.1 and 17.2 percentage point increase in completion compared to an outcomes-based incentive strategy.

**SUSTAINING ENGAGEMENT**

Engagement can also be viewed in terms of status progression. Moving up to a higher Vitality Status requires long-term engagement. Employers who deploy a VCM strategy see higher percentages of members in more engaged status levels.

For example, the status distribution charts below show a comparison between clients who do not use a VCM strategy and those who do, and set it at Gold status or higher. Clients who use the VCM strategy aligned to Gold status or above see a substantial decrease in the low-engaging population (Bronze) while experiencing increases in the populations reaching higher engagement statuses (Silver and above).

**ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT**

The VCM can be an effective method of encouraging higher employee engagement. Employee engagement beyond VHR completion is defined as the average number of healthy activities per month tracked by Vitality. Our analysis showed varying increases of activities completed ppm, depending on VCM strategy. For example, clients in year 1 would expect to see an average of 2.2 activities ppm, for an outcomes-based VCM strategy, 3.5 activities ppm aligned to a tiered VCM strategy, and 4.4 activities ppm for a VCM strategy aligned to Gold status or above, a respective 69 percent, 169 percent, and 238 percent increase in engagement in activities ppm compared to clients who do not use a VCM strategy with an expected activities ppm of 1.3.
2. Communication

In the United States, only 12 percent of adults have a proficient health literacy level, meaning that the majority of American adults would be challenged with common health tasks, e.g., understanding nutrition labels. Effective communication educates members on health and well-being. This is critical to changing health behavior and ultimately making people healthier.

Communication strength falls into either strong, medium, or low categories

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<tr>
<th>LOW</th>
<th>MEDIUM</th>
<th>STRONG</th>
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<tbody>
<tr>
<td>Client-side Only triggered alerts</td>
<td>Monthly communications, Communications Center</td>
<td>Client-side Only triggered alerts, Quarterly communications, Communications Center</td>
</tr>
<tr>
<td>Turned off by members</td>
<td>Quarterly communications</td>
<td>Monthly communications, Communications Center</td>
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<tr>
<td>Refreshes members or engages</td>
<td>Newsletter newsletters</td>
<td>Monthly communications, Communications Center</td>
</tr>
<tr>
<td>Communications strategy is not aligned</td>
<td>Participation in quarterly campaigns</td>
<td>Directors focus on delivering messages</td>
</tr>
<tr>
<td>Not visible to members and key stakeholders</td>
<td>Monthly communications, Communications Center</td>
<td></td>
</tr>
<tr>
<td>For more information on year 1</td>
<td>Directors focus on delivering messages</td>
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There is a significant correlation between employers deploying strong levels of communication and increased completion of the VHR compared to groups who have low communication strength. For example, a client who has a low level of communication strength can expect to experience a 43.9 percent VHR completion rate in program year 1 and a 49.8 percent completion rate in years 2 and 3. Comparatively, employers who have a strong level of communication strength can expect to experience a 64.7 percent completion rate in program year 1 and a 71 percent completion rate in years 2 and 3, a respective 20.8 percentage point difference in completion rates in year 1 and 21.2 percentage point difference in years 2 and 3.

![VHR Completion Rate Chart](chart)

This trend continues in program years 2 and 3 with expected engagement in activities pmpm for low communication strength groups at 2.6 activities pmpm, 4.5 for groups with medium communication strength, and 5.8 for groups with strong communication strength, representing a 73.1 percent and 123.1 percent increase in activities pmpm.

SUSTAINING ENGAGEMENT

When looking at engagement in terms of Vitality Statuses, our data suggests that there is a significant correlation between employers who have stronger levels of communication strength and increased populations in higher engaged Vitality Status (Silver and above). For example, the status distribution charts below show a comparison between clients who have low communication strengths to those who have strong communication strength, where those who offer strong levels of communication show a substantial decrease of the low engaging population (Bronze) while increasing the populations reaching higher engagement statuses (Silver and above).

![Vitality Status Distribution](chart)

ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT

The analysis also shows that the level of communication strength has an impact on the number of activities members are engaging in per month. For example, clients in year 1 would expect to see an average of 1.9 activities pmpm for groups with low communication strength, 3.5 for employers with medium communication strength, and 4.7 for employers with strong communication strength, a respective 84.2 percent and 147.4 percent increase in activities pmpm.
Earlier in this study we discussed present bias. To address this powerful decision error, Vitality offers clients an additional strategy: the Vitality Mall®. Through the Mall, members can use their points earned through engagement throughout the program, to reward themselves with some of the most powerful consumer brand products, helping them overcome behavioral barriers in present bias.

Our analysis shows a correlation of increased engagement at various levels when the Mall is offered, dependent on the level of the offering. Vitality Mall® can be configured to meet a client’s budgetary requirements as the monetary value of the “Vitality Buck®” can be set to one of three levels (low, standard, or high).

As reflected in the VHR Completion Rate graph below, VHR completion rates differ depending on the level of Mall offered by the employer. For example, in program year 1, a group who has a low-level Mall can expect to experience a 52.3 percent VHR completion rate, 57.2 percent for a group offering a standard Mall, and a 63.9 percent completion rate for groups offering a high Mall. That’s a respective 4.1, 9, and 15.7 percentage point increase in VHR completion compared to those who do not offer the Mall (48.2 percent VHR completion rate).

This trend continues in program years 2 and 3 with those who offer a low mall experiencing 59.9 percent VHR completion rate, those offering a standard Mall 63.9 percent, and those offering a high Mall 70.2 percent, a respective 4.3, 9.3, and 15.6 percentage point increase in VHR completion compared to those who do not offer the mall (54.6 percent VHR completion rate).

**SUSTAINING ENGAGEMENT**

When considering engagement in terms of Vitality Status, our data suggests that there is a correlation between increased percentage of members in higher Vitality Status and employers offering the Mall. For example, the Status Distribution Shifts charts show the status distribution between clients who do not offer the Mall compared to those who offer a high Mall offering. The high Mall offering shows a substantial decrease of low engaging population (Bronze) while increasing the populations reaching higher engagement statuses (Silver and above).

**ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT**

When looking at engagement in terms of number of activities members complete per month, our analysis shows increased engagement in activities pmpm when compared to no Mall. For example, clients in year 1 would expect to see an average of 2.9 activities pmpm for clients with a low Mall offering, 3.5 for employers with a standard Mall offering, and 4.5 for employers with a high Mall offering, a 20.8 percent, 45.8 percent, and 87.5 percent increase in activities pmpm compared to those who do not offer the Mall (2.4 activities pmpm).
4. Spouse Eligibility

Social networks can have a profound impact on an individual's health. Dr. Nicholas Christakis and James Fowler, in their article *The Collective Dynamics of Smoking in a Large Social Network* published in the New England Journal of Medicine, evaluated smoking behavior and the impact of social-network ties over a 32-year period. Their findings showed that when one spouse quit smoking, the other spouse was dramatically less likely to smoke. Our analysis shows a correlation between inclusion of spouses and higher engagement.

As reflected in the VHR Completion Rate graph below, completion rates of the VHR differ depending on whether the employer includes or excludes spouses. For example, a group in program year 1 who does not allow spouses as part of the program can expect to experience a 57.2 percent VHR completion rate, while those who offer the program to spouses see a 62.3 percent completion rate completion rate, a 5.1 percentage point increase.

The trend continues in years 2 and 3. Groups who exclude spouses from the program experience a 63.9 percent VHR completion rate, while those who include spouses experience a 68.7 percent completion rate, a 4.8 percentage point increase.

ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT

We also see a difference in engagement levels by activities completed pmpm between groups who include spouses, compared to those who do not. Groups who do not offer spouses on the program experience 3.5 activities pmpm, whereas groups who do offer the program to spouses experience 4.3 activities pmpm, a 22.9 percent Increase.

In program years 2 and 3, this trend continues as our analysis shows that groups who do not offer the program to spouses experience 4.5 activities pmpm, whereas groups that do include spouses on the program experience 5.4 activities pmpm, a 20 percent increase.

SUSTAINING ENGAGEMENT

Looking at engagement in terms of Vitality Status, our data suggests that there is a correlation between employers who include spouses on the program and higher percentages of members in more engaged status levels (Silver and above). For example, those who offer the program to spouses show a substantial decrease of the low-engaging population (Bronze) while increasing the populations reaching higher engagement statuses (Silver and above).

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*a Spouse eligibility includes both eligibility and a spouse VCM requirement*
5. Device Subsidy

Fitness tracking devices have come a long way from traditional pedometers to devices that track multiple vitals and integrate with smartphones and smartwatches. With the proliferation of fitness devices being introduced to the masses, it has made current physical activities levels more present and easy to understand.

There is a correlation between the offering of a device subsidy and increased participation in the VHR. For example, a group that does not offer a device subsidy as part of the program can expect to experience a 57.2 percent VHR completion rate in year 1 of the program, while those who do offer a device subsidy experience a 59.2 percent completion rate, a 2 percentage point increase.

Additionally, in years 2 and 3, this trend continues with those groups who do not offer a device subsidy seeing a 63.9 percent VHR completion rate, while those that offer a device subsidy experience a 65.8 percent completion rate, a 1.9 percentage point increase.

**ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT**

We also see an increase in the average monthly activities pmpm when a device subsidy is offered compared to when it is not. Groups in program year 1 that do not offer a device subsidy experience 3.5 activities pmpm, whereas groups that offer a device subsidy experience 3.8 activities pmpm, an 8.6 percent increase.

In program years 2 and 3, this trend continues as our analysis shows that groups that do not offer a device subsidy on the program experience 4.5 activities pmpm, whereas groups that do offer a device subsidy experience 4.8 activities pmpm, a 6.7 percent increase.

**SUSTAINING ENGAGEMENT**

Our data shows a correlation between employers who offer a device subsidy and higher percentages of members in the more engaged status levels (Silver and above). The status distribution charts below show that employers who offer a device subsidy have a lower proportion of members in the low engaging population (Bronze status) and an increased proportion of members in higher engagement statuses (Silver status and above).
6. Champs Program

Earlier in the study, we introduced the impact that social networks can have on overall engagement in the program, and supporting evidence from Dr. Christakis and James Fowler. An additional study by Christakis and Fowler from the New England Journal of Medicine titled, 'The Spread of Obesity in a Large Social Network over 32 Years,' describes how a variety of social connections, including spouses, different degrees of friends, and other family members can have influence over obesity. The study's conclusion is that social networks can have a dramatic impact on your health. Working-age adults spend the majority of their time at work, and as such, there is an opportunity to be influenced, positively or negatively, by those around you. Vitality works with clients to establish an internal network of "Vitality Champs" that aims to find influential members within the workplace and enable them to promote the wellness program to their coworkers. Champs are wellness ambassadors, spreading the culture of health throughout their clients' organization, and our data has shown them to be significantly influential in driving engagement.

Champs programs fall into either weak or strong programs.

<table>
<thead>
<tr>
<th>NONE</th>
<th>WEAK</th>
<th>STRONG</th>
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<tbody>
<tr>
<td>Champs deployed: 2 meetings each month at the workplace. They are not required (early morning, lunchtime).</td>
<td>Champs program is well received and Champs attend and run monthly meetings. They are motivated and energetic. They have the freedom of running regular activities. They have input into the program's initiatives and have adopted or initiated their own initiatives.</td>
<td>Champs program is a success. Champs program is well received and Champs attend and run monthly meetings. They are motivated and energetic. They have the freedom of running regular activities. They have input into the program's initiatives and have adopted or initiated their own initiatives.</td>
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</table>

Employers deploying a weaker Champs program experience a 57.2 percent VHR completion rate in year 1 of the program, while those with a stronger Champs program experience a 58.9 percent completion rate, a 1.7 percentage point increase.

Additionally, in years 2 and 3, this trend continues with those groups that have a weaker Champs programs experiencing a 62.9 percent VHR completion rate, while those that have a stronger Champs program experience a 65.6 percent completion rate, a 1.7 percentage point increase.

ENCOURAGING REGULAR EMPLOYEE ENGAGEMENT

Our analysis also shows a correlation between employers who establish a Champs program and higher engagement in activities pmpm depending on the strength of the Champ program. For example, groups that have a weak Champs program experience 3.5 activities pmpm, whereas groups that have a strong Champs program experience 3.8 activities pmpm in program year 1, a respective 8.8 percent increase compared to employers who do not have a Champs program in place.

This trend continues in years 2 and 3 as our analysis shows that groups who have a weak Champs program experience 4.5 activities pmpm, whereas groups who have a strong Champs program experience 4.8 activities pmpm, a respective 6.7 percent increase compared to employers with no Champs program in place.

SUSTAINING ENGAGEMENT

The analysis showed a correlation to the presence of a Champs program and an increase in members progressing into higher Vitality Statuses. For example, employers who have a strong Champs program see a decrease in the low engaging population (Bronze status) while increasing the population reaching higher engagement statuses (Silver and above).
WHAT DO COMPANIES WITH HIGH EMPLOYEE ENGAGEMENT DO DIFFERENTLY?

Having analyzed how each incentive or company support structure can impact various engagement levels, the next part of the analysis reviews the cohort of employers included in the engagement study analysis and identifies the program incentives or company support structures that companies with highly engaged employees have in place.

The level of engagement is determined by the following:

<table>
<thead>
<tr>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
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<tr>
<td>Defined as less than 3.37 monthly activities with a VHR completion rate below 41 percent.</td>
<td>Defined as 3.37-6.63 monthly activities with a VHR completion rate in excess of 41 percent.</td>
<td>Defined as more than 6.63 monthly activities with a VHR completion rate in excess of 41 percent.</td>
</tr>
</tbody>
</table>

VITALITY CONTRIBUTION MANAGER

The analysis shows that employers who achieve high levels of engagement deploy a VCM strategy, with a tiered VCM and Gold Vitality Status or above being the most common amongst groups achieving high engagement levels. Employers who achieve lower levels of engagement either do not deploy a VCM strategy or use an activity-based VCM.

DEVICE SUBSIDY

Offering a device subsidy was shown to have an impact on engagement. It is important to note that device subsidies are not offered universally and are not widely adopted. However, this part of the analysis shows that employers who do offer a device subsidy are more likely to reach the highly engaged cohort.

COMMUNICATION

Where the level of communication was shown to have a significant impact on various measurements of engagement, this part of the analysis shows that the majority of employers who reach high levels of engagement have a strong level of communication, while the majority of those who fall into the low engagement category have weak communication strength.

CHAMPS PROGRAM

Establishment of a Champs program was shown to drive increases in engagement in the first part of the analysis. Overall, employers who establish a Champs program are significantly more likely to reach the highly engaged cohort, while employers who do not establish a Champs program are found to be in lower engaged cohorts.

REWARDS MALL

Our analysis shows that the majority of clients who achieve a high level of engagement offer a standard level of the Mall, while groups who offer a low level of mall or no mall at all see the highest percentage of clients who fall into the low engagement category.

CHALLENGES

Challenges such as health review completion, steps, or workouts can be effective in getting people motivated and engaged in healthy lifestyle activities. While challenges did not appear in the first part of the analysis as an individual program component driving significant engagement, it does appear in the second part of the analysis as the majority of groups reaching the highly engaged cohort offer challenges in the program, compared to those that do not offer challenges, which typically reach lower levels of engagement.

SPOUSE ELIGIBILITY

The first part of the analysis showed how spouse eligibility coupled with a VCM requirement for spouses can improve engagement. A similar trend continues in this part of the analysis as the majority of groups who reach high levels of engagement include spouses as eligible on the program with a VCM requirement, whereas lower engaging groups tend to offer spouse eligibility without a VCM or do not offer spouse eligibility.
The chart below is a visual representation of where the cohort of clients included in this analysis fall in relation to low, medium, and high engagement.

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**Principles in Practice—Lessons from Vitality Clients**

**McKesson** is recognized as the largest healthcare services company in the nation and ranks 5th on the FORTUNE 500 list of companies with more than $190 billion in annual revenue. McKesson’s workforce members reside in all 50 states, and the average distance from McKesson’s corporate headquarters is 1,769 miles to their employees, resulting in a relatively disperse population with unique challenges.

Since joining Vitality, McKesson has effectively used Vitality’s incentives, technology, and account management team, and have put in place strong support structures to encourage employees to participate and engage in the program. The company has received prestigious awards, such as the 2015 C. Everett Koop National Health Award for their health and well-being offerings and it has seen impressive outcomes in improved health and financial benefits.

**Incentives**

- VCM
- Device subsidy
- Vitality Mall

**Company Support**

- Strong wellness communication
- Vitality Champs
- Spouses on program

**Wellness Results**

- 73.6% VHR Completion Rate
- 10 average monthly activities per employee
- 67.3% of current employees earned Vitality Silver status or above.

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* The incentives and company support structures referenced are not the only program components in place for the client, but only represent those that are currently live.
** Program results from program year 2014 January - December.
METHODOLOGY

Health participation is defined as the percentage of employees within a company who completed the Vitality Health Review prior to the completion of their most recent program year as of September 2016. Engagement has been defined as the number of activities completed per employee in a given program year, which could be measured as a function of the VHR completion rate, monthly activities\(^a\), or the Vitality Status distribution.

The study is composed of 110 diverse clients\(^b\), which were believed to encompass a reasonable representation of the market more generally. A Generalized Linear Model was fitted to the data with a coefficient of determination - or \(R^2\) - equal to 0.71. Status Score\(^c\) was used as the response variable, from which VHR completion rate, monthly activities and the Vitality Status distribution were all derived.

The analysis revealed that the Vitality Contribution Manager and Communication Strength were the two most substantial drivers of engagement, with each variable proving to be statistically significant at the 5 percent level.

All the demographic parameters were treated as numeric variables (with the exception of industry) while the majority of incentive parameters, such as the VCM and Rewards Mall, were treated as categorical variables. For the qualitative measures, the definitions of Communication Strength and the Champs program were developed by the Vitality Strategy Management team leads; the Rewards Mall level was determined by a given client's Vitality Buck to dollar conversion rate.

References

\(^a\) Monthly activity includes all VHR elements: Check-up Newsletters, and still reported Healthy Results. Average monthly activity counts are calculated by dividing total monthly activity counts by the number of Vitality eligible members at a given time.

\(^b\) All clients included in the study were standard groups with a 12-month program year.

\(^c\) Status Score is a weighted average of a group's Vitality Status distribution. In particular, Status Score is the Silver Status, Silver Plus Status, Gold Status, and Platinum Status.

COMMUNICATION STRENGTH

**Weak:**
Client sends only quarterly communications or less; needs regular assistance on what/how to communicate; does not often use the Vitality Communication Center and does not follow the annual communication plan developed with the Vitality Strategy Manager (WSM).

**Medium:**
Client sends communications twice per quarter, needs minimal assistance on what/how to communicate; periodically uses the Vitality Communication Center, and follows most of the annual communication plan developed with the WSM. May use some communication features in the PCV and may have Champs that assist with communication.

**Strong:**
Client sends communications at least monthly, does not need assistance with Vitality Communication Center and utilizes it consistently, regularly follows the annual communication plan developed with the WSM. Offers Champs for communications regularly if they have a Champs program, and utilizes the Challenges platform. Incorporates other forms of communication, i.e., push notifications, PCV message center, newsfeed, and other resources available to them such as their app, digital message boards, posters, etc.

REWARDS MALL

**None:** No Mall

**Low:** Low Mall factor

**Standard:** Standard Mall factor

**High:** High Mall factor

CHAMPS

**None:** No Champs program

**Weak:**
Champs identified, Champs meetings often cancelled and/or are sparsely attended. They are not motivated (may have been assigned vs. volunteered) and have little support and are not empowered to run activities on their own at their locations.

**Strong:**
Champs program is established and Champs attend and run monthly calls. They are motivated and active, and they have the freedom to run regular activities. They have full support of management, and have access to and utilize the employer portal to manage employer-sponsored events.
The Vitality Health Review™ (VHR) is a confidential questionnaire designed to help you identify your health and lifestyle factors, as well as areas on which you can focus to improve your overall health and well-being. Based on your answers, we'll provide you with a personalized report, goals, and your Vitality Age™. You'll also earn Vitality Points™ for completing it.

The sections you will need to complete will ask:

A. About You
B. Fitness and Exercise
C. Eating Habits
D. Work and Home Life
E. Lifestyle Habits
F. Physical Health
G. Key measurements
H. Signature

How to complete:
1. Fill in the answers to ALL of the questions to receive your Personal Pathway™ and earn Vitality Points.
2. Send the COMPLETED form to Vitality by fax: 877.224.7110 or email to: wellness@powerofvitality.com

A. ABOUT YOU

First Name [Field]
Last Name [Field]
Vitality ID [Field]
Gender [Field]
Date of Birth [Field]

1. How would you describe your overall health during the last year? Select one:
   - Excellent
   - Very good
   - Good
   - Fair
   - Poor

B. FITNESS AND EXERCISE

1. On average, how many days a week do you exercise? [Field] Days a week

2. On the days you exercise, on average:
   a. How many minutes do you exercise? [Field] Minutes
   b. How intense are your exercise sessions? [Field]
      - Low intensity
      - Medium intensity
      - High intensity

3. On average, how often do you do strength-training exercises such as push-ups, pull-ups, or weight training? Select one:
   - Rarely
   - Occasionally
   - Usually
   - Frequently

4. How often do you do flexibility exercises like stretching, yoga or Tai Chi? Select one:
   - Rarely
   - Occasionally
   - Usually
   - Frequently

5. On an average day, how much time do you spend doing the following activities?
   b. Sitting in front of computer [Field] Hours [Field] Minutes
   c. Sitting in meetings, gatherings or on the phone [Field] Hours [Field] Minutes

6. How do you feel about your current level of exercise? Select one:
   - I am happy with the amount of exercise I am doing.
   - I know my fitness level needs to improve, but don't really want to exercise more right now.
   - I want to increase my exercise and level of fitness, and would appreciate some help.

PLEASE COMPLETE ALL QUESTIONS BEFORE PROCEEDING
C. EATING HABITS

1. How many servings of vegetables and fruits do you eat each day?
   
   Servings
   
   One serving = ½ cup or 1 medium fruit
   One serving = ½ cup cooked vegetables or 1 cup raw vegetables or salad

2. How many servings of whole grains do you eat per day? (Such as whole grain bread, whole grain or high-fiber cereal like bran, oats, barley, millet, quinoa, spelt, bulgur wheat, whole corn, high-fiber or whole grain crackers, brown rice, whole wheat pasta.) Select one:
   
   Servings
   
   One serving = 1 slice of 100% whole grain bread; 1/2 cup whole grain or high-fiber cereal like bran (including high bulk bran, oats, barley, millet, whole corn, 3 – 4 high fiber or whole-grain crackers, ½ cup brown rice or whole wheat pasta)

3. Do you eat meat or fish?  
   
   Yes  No

4. If yes, when you do eat meat, how often is it lean meats such as skinless chicken, turkey, fish and lean red meats? Select one:
   
   Never  Rarely  Occasionally  Usually  Frequently

5. Do you eat or drink dairy products?  
   
   Yes  No

6. If yes, when you do eat or drink dairy products, how often do you consume low fat or fat-free dairy products? Select one:
   
   Never  Rarely  Occasionally  Usually  Frequently

7. How often do you add fat such as butter, stick margarine, cream or gravy to your food after cooking? Select one:
   
   Never  Rarely  Occasionally  Usually  Frequently

8. Between cooking and adding to meals at the table for taste, how much salt do you consume in an average day? Select one:
   
   A Pinch or less  Half Tsp  Level Tsp  Heaped Tsp  Two level Tsp  More than two level Tsp

9. How often do you eat salty foods such as snacks, packet soups, soy sauce, etc.? Select one:
   
   Never  Rarely  Occasionally  Usually  Frequently

10. On average, how many servings do you have of the following foods per day: cookies, cake, pastries, high-fat crackers, donuts, processed meat, stick margarine, deep-fried foods?
    
    Servings per day  OR  I do not consume on a daily basis.

11. On average, how many sugary drinks such as non-diet carbonated drinks, iced-tea, fruit punch, cordials, etc. do you consume per day?
    
    Drinks per day  OR  I do not consume on a daily basis.

12. On average, how many cups of sugar-sweetened tea or coffee do you drink per day?
    
    Cups per day  OR  I do not consume on a daily basis.

13. Which statement best describes how you feel about your diet? Select one:
    
    I am happy with my diet.
    I know my diet needs improvement but don’t really want to change it now,
    I want to change my diet, and would appreciate some help.
D. WORK AND HOME LIFE

SLEEPING HABITS
1. During the last month, how often did you have difficulty falling asleep or staying asleep, or felt poorly rested in the morning?
   [ ] Never          [ ] Rarely          [ ] Occasionally          [ ] Usually          [ ] Frequently

2. On average, how many hours of sleep do you get each day, including naps? ___ Hours

LIFE SATISFACTION
1. Please imagine a ladder with steps numbered from zero at the bottom to 10 at the top. The top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you.

   1a. On which step of the ladder would you say you personally feel you stand at this time?

   0 1 2 3 4 5 6 7 8 9 10
   Bottom of ladder                      Top of ladder

   1b. On which step do you think you will stand approximately five years from now?

   0 1 2 3 4 5 6 7 8 9 10
   Bottom of ladder                      Top of ladder

STRESS
1. During the last 30 days, how often did you:
   a. Feel tired for no good reason?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   b. Feel nervous?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   c. Feel so nervous that nothing could calm you down?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   d. Feel hopeless?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   e. Feel restless or fidgety?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   f. Feel so restless that you could not sit still?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   g. Feel depressed?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time
   h. Feel that everything was an effort?  Select one:
      [ ] Never          [ ] Not often          [ ] Some of the time          [ ] Most of the time          [ ] All of the time

PLEASE COMPLETE ALL QUESTIONS BEFORE PROCEEDING
i. Feel so sad that nothing could cheer you up? *Select one:*

- Never
- Not often
- Some of the time
- Most of the time
- All of the time

j. Feel worthless? *Select one:*

- Never
- Not often
- Some of the time
- Most of the time
- All of the time

2. How do you feel about your current level of stress? *Select one:*

- I feel that I am coping fine with my current level of stress.
- I feel stressed, but don’t feel the need to do anything about my stress levels.
- I want to manage my stress better and would appreciate some assistance.

WORK ENVIRONMENT

**SKIP TO QUESTION 6 IF YOU ARE NOT THE PRINCIPAL MEMBER OF THE VITALITY PROGRAM.**

1. How many hours does your employer expect you to work in a typical 7-day week? (If it varies, estimate the average. If more than 97, enter 97.)

   _ _ _ Hours

2. Please think of your work experiences over the past 4 weeks (28 days).
   In the spaces provided below, write the number of days you spent in each of the following work situations:

   In the past 4 weeks (28 days), how many days did you …

   a. _miss an entire_ work day because of problems with your physical or mental health? (Please include only days missed for your own health, not someone else's health.)

   _ _ _ Days

   b. _miss an entire_ work day for any other reason (including vacation)?

   _ _ _ Days

   c. _miss part of_ a work day because of problems with your physical or mental health? (Please include only days missed for your own health, not someone else's health.)

   _ _ _ Days

   d. _miss part of_ a work day for any other reason (including vacation)?

   _ _ _ Days

   e. _come in early, go home late or work on your day off?_

   _ _ _ Days

3. Approximately how many hours altogether did you work in the past 4 weeks (28 days)?

   _ _ _ Hours

Please imagine a ladder with steps numbered from zero at the bottom to 10 at the top. The top of the ladder represents the best possible job for you and the bottom of the ladder represents the worst possible job for you.

4. On which step of the ladder would you say you personally feel you stand at this time?

   0 1 2 3 4 5 6 7 8 9 10

   *Bottom of ladder*  

   *Top of ladder*

**PLEASE COMPLETE ALL QUESTIONS BEFORE PROCEEDING**
5. On a scale from 0 to 10 where 0 is the worst job performance anyone could have at your job and 10 is the performance of a top worker, how would you rate...

a. ...the usual performance of most workers in a job similar to yours? Circle one:

<table>
<thead>
<tr>
<th>0</th>
<th>1</th>
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<th>6</th>
<th>7</th>
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<th>10</th>
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<td>O</td>
<td>s</td>
<td>t</td>
<td>P</td>
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<td>r</td>
<td>f</td>
<td>o</td>
<td>m</td>
<td>a</td>
</tr>
</tbody>
</table>

b. ...your usual job performance over the past year or two? Circle one:

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<tr>
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<th>1</th>
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<th>3</th>
<th>4</th>
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<tbody>
<tr>
<td>W</td>
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<td>o</td>
<td>m</td>
<td>a</td>
</tr>
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</table>

c. ...your overall job performance on the days you worked during the past 4 weeks (28 days)? Circle one:

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<tr>
<th>0</th>
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<th>4</th>
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<td>o</td>
<td>m</td>
<td>a</td>
</tr>
</tbody>
</table>

6. What is your highest level of education?

☐ Did not complete high school ☐ High school ☐ Some college ☐ College degree ☐ Advanced post-undergraduate degree

E. LIFESTYLE HABITS

TOBACCO

1. Do you currently use any tobacco products such as cigarettes, cigars, pipes, chewing tobacco or snuff? Complete section a, b OR c:

a. No, I have never used tobacco products.

b. Not currently, but I used to use tobacco products.

b1. Which of the following tobacco products have you used in the past?

☐ Cigarettes ☐ Cigar, pipe or other smoking tobacco ☐ Chewing tobacco, snuff or smokeless tobacco

b2. When you smoked, how many cigarettes did you smoke on average per day? ☐ ☐ Per day

b3. How long has it been since you stopped smoking cigarettes? ☐ ☐ ☐ Years ☐ ☐ ☐ Months

c. Yes, I currently use tobacco products.

c1. Which of the following tobacco products do you currently use?

☐ Cigarettes ☐ Cigar, pipe or other smoking tobacco ☐ Chewing tobacco, snuff or smokeless tobacco

c2. How many cigarettes do you smoke in average per day? ☐ ☐ ☐ Per day

c3. How long have you been smoking cigarettes? ☐ ☐ ☐ ☐ Years ☐ ☐ ☐ ☐ Months

c4. How do you feel about your current smoking habits? Select one:

☐ I have no intention of quitting smoking.

☐ I plan to stop smoking in the future.

☐ I would like to know how to begin the process of quitting smoking now.

PLEASE COMPLETE ALL QUESTIONS BEFORE PROCEEDING
From time to time Vitality introduces questions to help us understand how our members are interacting with emerging health trends, before integrating the results into your program. Your answer is appreciated and helps us to identify potential program improvements.

2. Have you ever used e-cigarettes, a nicotine vaporizer or an electronic nicotine delivery system?
   a. No, I have never used any of these products.
   b. Not currently, but I used to.
      b1. What was your primary reason for using these products?
         [ ] I was trying to quit smoking.
         [ ] In social situations where cigarettes were not allowed
         [ ] I enjoyed them.
         [ ] Other reason not listed here
   c. Yes, I currently use these products.
   c1. What is your primary reason for using these products?
      [ ] I am trying to quit smoking.
      [ ] In social situations where cigarettes are not allowed
      [ ] I enjoy them.
      [ ] Other reason not listed here
   d. I choose not to answer.

ALCOHOL

1. Do you drink alcohol?  [ ] Yes  [ ] No  If yes, continue this section.
   [ ] Yes  [ ] No

2. Have you ever felt you should cut down on your drinking?
   [ ] No

3. Have people annoyed you by criticizing your drinking?
   [ ] No

4. Have you ever felt guilty about your drinking?
   [ ] No

5. Have you ever had a drink first thing in the morning to steady your nerves or to get rid of a hangover (eye-opener)?
   [ ] No

6. On average, how many alcoholic drinks do you have per week?  One drink is equivalent to:
   1 beer can = 12 oz
   1 small glass of wine = 6 oz
   1 shot of liquor = 1 oz
   1 small glass sherry = 2 oz
   1 small glass liquor = 1 oz
   [ ] Drinks per week

7. How many times in the past 2 months have you had 4 or more drinks on one occasion?
   [ ] Never  [ ] One time  [ ] 2-4 times  [ ] 5 or more times
F. PHYSICAL HEALTH

MEDICAL HISTORY

INITIAL BOX BELOW. COMPLETE QUESTION 1 AND 2 (CONTINUED ON PAGE 8) OR PROCEED TO KEY MEASUREMENTS (SECTION G ON PAGE 8).

In accordance with the Genetic Information Nondiscrimination Act of 2008, the completion of this section is voluntary. Any financial incentives associated with the completion of this VHR will be provided whether or not you answered the questions in this section. The information will be used to personalize your Vitality experience and recommendations and will not be available to your employer on an individually identifiable basis.

Please initial in the adjacent box to indicate that you understand and voluntarily agree with these terms: ☐

1. Select any conditions with which you have been diagnosed or for which you have been prescribed medication:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Yes</th>
<th>No</th>
<th>If yes, are you taking prescription drugs regularly?</th>
<th>If yes, are you currently under regular medical care?</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Allergy</td>
<td>☐</td>
<td>☐</td>
<td>a1. ☐</td>
<td>a2. ☐</td>
</tr>
<tr>
<td>b. Arthritis</td>
<td>☐</td>
<td>☐</td>
<td>b1. ☐</td>
<td>b2. ☐</td>
</tr>
<tr>
<td>c. Asthma</td>
<td>☐</td>
<td>☐</td>
<td>c1. ☐</td>
<td>c2. ☐</td>
</tr>
<tr>
<td>e. Cancer</td>
<td>☐</td>
<td>☐</td>
<td>e1. ☐</td>
<td>e2. ☐</td>
</tr>
<tr>
<td>f. Chronic lung disease</td>
<td>☐</td>
<td>☐</td>
<td>f1. ☐</td>
<td>f2. ☐</td>
</tr>
<tr>
<td>g. Chronic pain</td>
<td>☐</td>
<td>☐</td>
<td>g1. ☐</td>
<td>g2. ☐</td>
</tr>
<tr>
<td>h. Depression</td>
<td>☐</td>
<td>☐</td>
<td>h1. ☐</td>
<td>h2. ☐</td>
</tr>
<tr>
<td>i. Heartburn or Acid Reflux</td>
<td>☐</td>
<td>☐</td>
<td>i1. ☐</td>
<td>i2. ☐</td>
</tr>
<tr>
<td>j. Heart Disease</td>
<td>☐</td>
<td>☐</td>
<td>j1. ☐</td>
<td>j2. ☐</td>
</tr>
<tr>
<td>k. Menopause (females only)</td>
<td>☐</td>
<td>☐</td>
<td>k1. ☐</td>
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<tr>
<td>l. Migraine headaches</td>
<td>☐</td>
<td>☐</td>
<td>l1. ☐</td>
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<td>m. Osteoporosis</td>
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<td>m1. ☐</td>
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<tr>
<td>n. Sleep Disorder</td>
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<td>☐</td>
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<td>o. Stroke</td>
<td>☐</td>
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<td>o2. ☐</td>
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<tr>
<td>p. Thyroid Disease</td>
<td>☐</td>
<td>☐</td>
<td>p1. ☐</td>
<td>p2. ☐</td>
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<tr>
<td>q. Other</td>
<td>☐</td>
<td>☐</td>
<td></td>
<td></td>
</tr>
<tr>
<td>r. Are you currently pregnant (females only)</td>
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</table>

PLEASE COMPLETE ALL QUESTIONS BEFORE PROCEEDING
**MEDICAL HISTORY**

2. Have you ever been diagnosed with any of the following medical conditions by a doctor or been prescribed medication for any of them?

   a. Diabetes
      
      a1. If yes, has your physician recommended regular prescription drug use?  
      a2. If yes, are you currently under regular medical care?  
      a3. If yes, what is your current HbA1c level?  
      a4. If you don't know, do you know if it was in range  
      a5. If yes, do you have Type I Diabetes or Type II Diabetes?  
      a6. What is your fasting blood glucose level?  
      a7. If you don't know, do you know if it was high  

   b. High blood pressure or hypertension
      
      b1. If yes, has your physician recommended regular prescription drug use?  
      b2. If yes, are you currently under regular medical care?  
      b3. What was your last blood pressure reading?  
      b4. If you don't know, do you know if it was high  

   c. High cholesterol
      
      c1. If yes, has your physician recommended regular prescription drug use?  
      c2. If yes, are you currently under regular medical care?  
      c3. What is your total cholesterol level?  
      c4. If you don't know, do you know if it was high  
      c5. What is your HDL level?  
      c6. What is your LDL level?  
      c7. What is your triglyceride level?  

**G. KEY MEASUREMENTS**

1. What is your height?  
2. What is your current weight?  
3. What is the measurement of your natural waist?  

4. How do you feel about your current weight. Select one:
   
   I am happy with my weight.  
   I am not happy with my weight but have no intention of losing weight any time soon.  
   I would like to change my weight and would appreciate help in doing so.  

**PLEASE COMPLETE ALL QUESTIONS AND SIGN BELOW BEFORE SUBMITTING**

**H. SIGNATURE**

I confirm that the answers to the questions are true and correct to the best of my knowledge.

Signature:  
Date:  /  /
Vitality Health Review: 7 Steps
Step 1: Overall Health

VITALITY HEALTH REVIEW

How would you describe your overall health during the last year?

Poor  Fair  Good  Very good  Excellent
Step 2: Fitness and Exercise

Vitality Health Review

How intense are these exercise sessions?

On average how many minutes do you spend doing so?

On days when you do exercise, on average how many days a week do you exercise?
Step 2: Fitness and Exercise (cont.)

... how often do you do strength training exercises such as push-ups, pull-ups, or weight training?

... how often do you do flexibility exercise like stretching, yoga, or Tai Chi?

On an average day, how much time do you spend ...

... watching TV?

3 HOURS 0 MINUTES

... sitting in front of a computer?

4 HOURS 0 MINUTES

... in meetings, gatherings, or on the phone?

2 HOURS 0 MINUTES
Step 2: Fitness and Exercise (cont.)

How do you feel about your current level of exercise?

- I am happy with the amount of exercise I am doing.
- I knew my fitness level has to improve, but I don't really want to exercise more right now.
- I want to increase my exercise and level of fitness, and would appreciate some guidance on how to do this.
Step 3: Eating Habits

VITALITY HEALTH REVIEW

How many ...
... servings of vegetables and fruit do you eat per day? 2 SERVINGS

... servings of whole grains do you eat per day? 2 SERVINGS

Do you eat any meat or fish?

Yes No
Step 3: Eating Habits (cont.)

When you eat or drink dairy products, how often do you consume low fat or fat-free dairy products? 

Do you eat or drink any dairy products?

When you eat meat, how often do you eat lean meats such as skinless chicken, turkey, fish, and lean red meat?
### Step 3: Eating Habits (cont.)

**How often do you add fats such as butter, stick margarine, cream, and/or gravy to your food after cooking?**

- None selected
- Never
- Rarely
- Occasionally
- Usually
- Frequently

**How often do you eat salty foods such as snacks, packet soups, soy sauce, etc.?**

- None selected
- Never
- Rarely
- Occasionally
- Usually
- Frequently

**Between cooking and adding to meals for taste, how much salt would you say you consume in an average day?**

- A pinch or less
- One half teaspoon
- Level teaspoon
- Heaping teaspoon
- 2 level teaspoons
- More than 2 level teaspoons
Step 3: Eating Habits (cont.)

On average...

- How many servings do you have of the following foods per day: margarine, deep fried foods, cookies, cake, pastries, high fat crackers, donuts, processed meat, stick?

I do not consume on a daily basis.

- How many sugary drinks such as non-diet carbonated drinks, ice-cream, fruit punch, cordial, etc. do you consume per day?

I do not consume on a daily basis.

- How many cups of sugar-sweetened tea or coffee do you drink per day?

I do not consume on a daily basis.

How do you feel about your current eating habits?

- I am happy with my diet.
- I know my diet needs improvement, but I don’t really want to change it right now.
- I want to change my diet, and would appreciate some help.
Step 4: Mental Well-being

VITALITY HEALTH REVIEW

During the last month, how often have you had difficulty falling asleep or staying asleep, or have felt poorly rested in the morning?

On average, how many hours of sleep do you get daily, including naps?

5 HOURS
Step 4: Mental Well-being (cont.)
Step 4: Mental Well-being (cont.)

Hopeless

None selected

Never

Not often

Some of the time

Most of the time

All of the time

Restless or fidgety

None selected

Never

Not often

Some of the time

Most of the time

All of the time

So restless that you could not sit still

None selected

Never

Not often

Some of the time

Most of the time

All of the time

Depressed

None selected

Never

Not often

Some of the time

Most of the time

All of the time
Step 4: Mental Well-Being (cont.)
Step 4: Mental Well-being (cont.)

Please imagine a ladder with steps numbered from 0 at the bottom to 10 at the top. The top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you.

On which step of the ladder would you say you personally feel you stand at this time?

On which step do you think you will stand about five years from now?
How many hours does your employer expect you to work in a typical 7-day week?

About how many hours altogether did you work in the past 7 days?

On which step of the ladder would you say you personally feel you stand at this time?

Please imagine a ladder with steps numbered from 0 at the bottom to 10 at the top. The top of the ladder represents the best possible job for you and the bottom of the ladder represents the worst possible job for you.
Step 5: Work Life (cont.)

In the **past 4 weeks** (28 days)...

... how many days did you miss an *entire* workday because of problems with your physical or mental health? *(Please include only days missed for your own health, not someone else's health)*

0 days

... how many days did you miss an *entire* workday for any other reason? *(including vacation)*

0 days

... how many days did you miss *part* of a workday because of problems with your physical or mental health? *(Please include only days missed for your own health, not someone else's health)*

0 days

... how many days did you miss *part* of a workday for any other reason? *(including vacation)*

0 days

... how many days did you come in early, go home late, or work on your day off?

0 days

... about how many hours altogether did you work in the past 4 weeks (28 days)?

200 hours
Step 5: Work Life (cont.)

On a scale from 0 to 10 where 0 is the worst job performance anyone could have at your job and 10 is the performance of a top worker...

How would you rate your overall job performance over the past 4 weeks (28 days)?

How would you rate your overall job performance over the past year or 12 months?
Step 5: Work Life (cont.)

What is your highest level of education?

- Did not complete High School
- High School graduate or GED
- Some College
- College graduate
- Postgraduate
Which of the following tobacco products have you used in the past?

- Cigarettes
- Cigar pipe or other smoking tobacco

Do you currently use any tobacco products such as cigarettes, cigars, pipes, chewing tobacco, or snuff?

Options:
- Yes, I currently use tobacco products
- No, I have never used tobacco products
- Not currently, but I used to use tobacco products

Vitality Health Review

Step 6: Alcohol and Tobacco
Do you drink Alcohol?

Yes  No

From time to time Vitality introduces questions to help us understand how our members are interacting with emerging health trends, before integrating the results into your program. Your answer is appreciated and helps us to identify potential program improvements.

Have you ever used e-cigarettes, a nicotine vaporizer or an electronic nicotine delivery system?

- No, I have never used any of these products
- Not currently, but I used to
- Yes, I currently use these products
- I choose not to answer
Step 7: Conditions and Measures
Step 7: Conditions and Measures (cont.)

What is your current weight?
250 pounds

What is the measurement of your waist?
37 inches

How do you feel about your current weight?
- I am happy with my weight
- I am not happy with my weight, but have no intention of losing weight any time
- I would like to change my weight and would appreciate help doing so

What is your most current ...
... blood pressure reading?
116/70

... fasting blood glucose level?

Do you know if your total cholesterol is:

Low 
Normal 
High 

Do you know if your blood glucose is:

Low 
Normal 
High 

I'm not sure
Step 7: Conditions and Measures (cont.)

... low-density lipoprotein level (LDL or bad cholesterol level)?

- mg/dL
- I'm not sure

... high-density lipoprotein level (HDL or good cholesterol level)?

- mg/dL
- I'm not sure

... triglyceride level?

- mg/dL
- I'm not sure
Do you drink alcohol?

Yes, I currently use tobacco products

No, I have never used tobacco products

Do you currently use any nicotine replacement products such as chewing tobacco or snuff?

Yes

No

The Vitality Health Review

Plus: Vitality Today Mobile Access!
Thank you.
Improving What Matters
Through Improving Health
for The Rockford Public School District

CONTACT INFORMATION:
Rob Sparr, Director of Sales
RSparr@TheVitalityGroup.com
847.525.7631
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WHY VITALITY

Everyone benefits from better health — from individuals to employers to insurers, but healthy is hard. Because healthy is hard, we’ve seen a transition in focus throughout our industry, from an emphasis on comprehensive health to an emphasis on engagement, culture or tech platform solutions. The industry is leaving employers to have to pick and choose between the various focus areas.

That’s where Vitality comes in. We’re experts in blending smart tech, incentives, and consumer behavioral science to improve health and, in doing so, unlock the outcomes that matter to you. We leverage our certified wellness experts, actuaries, and highly-rated client support team to create strategies that work. Vitality combines this expertise with a cutting-edge technology platform and a program tailored to the specific needs of our clients and members. What we offer the member is an intuitive experience that through behavioral incentives, personalization, and the most effective innovations, drives both engagement for the member and outcomes for the employer. Meanwhile — “under the hood” — every aspect of the program is deeply rooted in clinical, financial and behavioral economic principles proven to drive real behavior change.

Our tradition of innovation — from leading the integration of wearable tech into wellness programs to our cutting-edge collaboration with Apple — sets us apart from others in the industry. For 20+ years, we’ve focused on one enduring core purpose: making people healthier and enhancing and protecting their lives. This has led us to tremendous recognition and partnership with some of the smartest companies and insurers around the globe, through which we now touch the lives of 7 million people every day across operations in 15 countries.

At Vitality, we’re focused on optimizing our clients’ investment in improved health, while remaining grounded in consumer behavioral and clinical science, data, and outcomes that prove Vitality works.

<table>
<thead>
<tr>
<th>INCREASED ENGAGEMENT</th>
<th>CLAIMS</th>
<th>CULTURE</th>
<th>OVERALL HEALTH &amp; WELL-BEING</th>
</tr>
</thead>
<tbody>
<tr>
<td>78%</td>
<td>12-15%</td>
<td>91%</td>
<td>92%</td>
</tr>
<tr>
<td>Increase in population reaching high level of Vitality Status*</td>
<td>Claims cost savings per highly engaged member per year**</td>
<td>Of members say Vitality improves their workplace culture***</td>
<td>Of members say Vitality improves aspects of their health and well-being***</td>
</tr>
</tbody>
</table>

*Three-year Status analysis  
**Three-year claims analysis, includes 12 groups between 21,000 and 52,000 members, highly engaged measure as Gold and Platinum Status  
***2017 Happiness Calibrator Vitality Member Survey
PERSONALIZE

We present each individual Vitality member with clear, contextualized health information — along with personalized and actionable resources — to make members’ health status easy to understand and to provide direction in a nonthreatening, yet effective, way.

Our proprietary HRA, known as the Vitality Health Review™, gathers information about each of the 14 modifiable health risk factors and conditions targeted by Vitality, as well as members’ readiness to change, perceived health status and productivity. We also offer many ways to seamlessly integrate member biometric screening data, including a pre-integrated screening partner network, ability to receive data from a partner of the District’s choice, and/or member submission via physician form.

Information from the Vitality Health Review, along with biometric screening data (if available) is analyzed and the member is presented with their age, adjusted to reflect his or her lifestyle behaviors and biometric outcomes. This Vitality Age serves as an “aha” moment and addresses typical overconfidence regarding health status; there is no positive in living older than you are and many individuals don’t realize how drastically their choices are affecting their lifespan. The Vitality Age is a powerful visual tool; in fact, 84% of members surveyed indicated Vitality Age motivated them to participate in the program.

Along with the Vitality Age, members are presented with their Health Profile. Risk factors are broken out clearly into categories: healthy, needs to improve or unknown. Each health attribute is accompanied by Recommended Resources and suggested Goals, pointing members toward program interventions that are meaningful to them during an important teachable moment, when they are most likely to act. Providing recommendations and suggestions based on health risks, readiness to change and interests gives each member the autonomy to start their engagement with the things that are important to him or her, leading to broader engagement over time.

84%

of members say their Vitality Age motivates them to improve their lifestyle habits¹

¹ 2017 Happiness Calibrator Vitality Member Survey
COMMUNICATE

Communication is key in any well-being initiative (our data shows that having strong communications can increase the size of the high-engaging population by 25%); however, communications need to be strategic and well-supported to truly reach and resonate with all members. Where others in the industry rely on generic messaging, we’ve structured sophisticated and personalized communication mechanisms both native to the Vitality program and customizable by the employer, all with the support and guidance of your Wellness Strategy Manager.

The member messaging created by Vitality is built to be tailored, familiar, engaging and consistent — presenting pertinent information at a time that makes the most sense for each individual member. Dynamic content, including congratulatory messages, surveys, links to articles, videos and more are presented to members multiple times daily via the homepage Newsfeed, a powerful communication channel for both Vitality and our clients. The Newsfeed drives sustained engagement through messages tailored to the individual’s health profile, readiness to change, activity in the program interests, while also featuring interactive content for all Vitality members. Along with the Newsfeed, members receive messages through their Message Center inbox, homepage alerts, smartphone push notifications, email and more, ensuring each member has access to information in the way that is most comfortable and effective for him or her.

For District-specific messaging, we provide guidance, strategy and robust and user-friendly tools, to deliver a wide variety of communications for all stages of your Vitality program. We will work with you to map out intended focus, goals, challenges and even messaging from your executive suite to develop a detailed communication calendar.

The District administrators will have a distinct form of access to Vitality through the Employer Portal, which includes:

- **The Communications Center**, where the District can find professionally created, on-demand Vitality program marketing templates for quick and easy distribution. The templates are available in a variety of formats (email, flyer, posters, etc.) to support program engagement on all fronts (e.g., pre- and post-launch material, program feature information, C-suite toolkit and support, social campaign information, program year transitions) and can be easily customized to reflect the District’s voice, tone and branding.

- **Targeted member messaging** can be configured directly and immediately through the Employer Portal. District-specific member messages are given prime real estate on the website (custom homepage alerts, Newsfeed posts, inbox messages). Push notifications can also be sent directly to members’ smartphones. Many portal communications can be designated by employee subgroup, location or specific risk factors to ensure that they are reaching the appropriate audience. As part of our Gateway integration platform, we also provide the District with a customized resources page to share information on company-specific programs, benefits, and more.
At a grassroots level, your WSM will also offer assistance and guidance in building and supporting your **Vitality Champ** program. Vitality Champs are selected employees of the District who the District and Vitality arm with resources, training, tools and support to successfully promote and help administer the Vitality program. Data shows that social networks and connections can have a profound impact on an individual's health and behavior; the best-practice guidance, setup and support of the Vitality Champs program has been proven to increase engagement and overall perception of the program by creating a culture of health within the workplace.

26%

Increase in long-term engagement through strong levels of communication²

² 2017 Vitality Engagement Study – by measure of progression into higher Vitality Status
CHOICE

Members can create a personalized plan to achieve success in the program by adding healthy activities to their Personal Pathway. The Personal Pathway, including activities, Recommended Resources and Goals, acts as a guide to help members understand what they can do to reach their objectives, and gives them a way to tailor their experience by focusing on what is important and personal to them. By providing recommendations and a clear path to well-being, while also allowing members a variety of ways to engage, we remove participation barriers and create an optimal user experience for each member and his or her preferences.

1.5x

INCREASE OF ACTIVITIES PER MEMBER PER MONTH

Vitality offers a broad range of activities and programs, all of which are native to our platform and/or leverage our numerous integrated partnerships.

PHYSICAL ACTIVITY
- Daily Workouts
- Athletic Events and Sports Leagues
- Physical Activity Review

EDUCATION
- Health FYI Monthly Webinar
- Health Resources (8,000+ Articles)
- Interactive Tools

LIFESTYLE AND NUTRITION
- Nutrition Courses
- HealthyFood Grocer Discounts
- Living Smoke Free Program
- Optional Telephonic Coaching

MENTAL HEALTH
- Mental Well-being Review
- HealthyMind (sleep, meditation, stress)

SOCIAL INTERACTION
- Challenges
- Vitality Champs
- Social Media Campaigns

FINANCIAL HEALTH
- Financial Resources and Goals
- Monetary Rewards

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1 2017 Vitality Engagement Study – by measure of Vitality Status-based incentive design vs. activity only
In addition to providing the member choices in activities and programs, we offer many ways for the member to participate. User experience is first and foremost in our platform development. Vitality leverages behavioral economic theory through game mechanics, subtle nudges and more, using cutting-edge technology to make engaging easy and fun for members. In addition to our platform’s responsive design, members can engage how, when and through the technology they want with the support of our free Vitality Today smartphone app, which features unique, smartphone-enabled functionality such as the ability to:

▪ Snap a photo of proof of verified activity (e.g., athletic events, CPR certification, flu shot) for Vitality Points
▪ Locate gyms and earn workout points by “Checking in,” verified using GPS and Foursquare technology

▪ Securely and quickly log in using Touch ID and navigate between the app and responsive website via built-in, single sign-on links
▪ Access Vitality HealthyMind: our mental well-being feature native to the app, which focuses on the avoidance of smartphone use prior to a full night’s sleep, and on mindfulness meditation through integration with top-rated, user-friendly, scientifically grounded apps like Headspace™, Calm™ and Apple® Breathe™.

89%
OF MEMBERS SAY THE VITALITY TODAY SMARTPHONE APP IS A HELPFUL TOOL TO ACHIEVE THEIR WELLNESS GOALS

85%
Of members surveyed say Vitality is personalized to them

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4 All third-party product names, trademarks, and copyrights are the property of their respective owners and are not intended as endorsements or any other affiliation with Vitality. All such product names and trademarks are used solely to identify examples of products currently compatible with Vitality Wellness Program.
5 2017 Happiness Calendar Vitality Member Survey
6 2017 Happiness Calendar Vitality Member Survey
INCENTIVIZE

Incentives, monetary or otherwise, play a critical role in tapping into peoples’ need for recognition and gratification for actions they take. We have been recognized around the globe as pioneers of the use of financial incentives within a well-being program, including by the most recent Nobel Prize winner in behavioral economics, Richard Thaler, who said about Vitality:

"[A] clever effort to combine health insurance with nudges designed to get people to live healthier lives."


As members complete health-related activities, they are awarded Vitality Points. Through the Points Planner tool, we use gamification mechanisms to give the member a clear view of points they have earned and where they are able to continue earning. The points system is familiar and fun for members and satisfies the need for instant gratification, each point assigned is also intentionally calibrated to lead to habit-forming behavior and is closely linked to the most important factors that determine health risks and outcomes.

Vitality Points earned through health-promoting activities and outcomes accumulate throughout each year, earning members higher Vitality Status. An important market differentiator, Vitality Status serves as both an aspirational tool for members and an extremely powerful engagement metric for employers. Status measures meaningful, ongoing program engagement, as year-long participation is required to reach higher levels of status (e.g., it takes an average of 3.5 months to reach Silver Status and 7.2 months to reach Platinum each year). Status unlocks a variety of incentives, further motivating initial and long-term engagement.

With regard to client-specific incentive strategy, the Vitality Contribution Manager (VCM) incentive tool allows the District to set your own requirements and provide rewards (premium reductions, HSA contributions, vacation days, etc.) for members. It is also an excellent opportunity to help offset the cost of — and possibly create a surplus from — funding of the wellness program. The tool is highly flexible and configurable, giving the District a vast range of options that can vary for new hires, benefit enrollment status and more. VCM criteria can be tied to:

- Activity (Vitality or District-specific);
- Biometric outcomes; or
- A combination of the two (blended approach through Vitality Status and/or specific activities and outcomes).

Vitality will provide member-level reporting to the District on who has met your specific criteria, which the District may use to fulfill the incentive of your choosing.

93%

OF MEMBERS UNDERSTAND WHAT'S REQUIRED OF THEM THROUGH THE VITALITY CONTRIBUTION MANAGER

Reward options include:

- The Mall gives members the opportunity to spend their Vitality Bucks (earned through Vitality Points) on products and gift cards from some of the leading consumer brands in the world (Amazon.com, Fitbit, Hotels.com and many more), ensuring that each member can work toward a reward that is meaningful to them. Bucks can be spent immediately upon being awarded, addressing the need for instant gratification.

- Earn Apple Watch is the result of a groundbreaking global partnership between our ultimate parent company, Discovery, and Apple, in which the amount members pay for the Apple Watch is solely based on their level of engagement in physical activity. Targeting loss aversion (not engaging = literal loss of money), the desire for the latest and greatest technology, gamification and the global epidemic of physical

THROUGH EARN APPLE WATCH + ACTIVE REWARDS, MEMBERS HAVE EXPERIENCED A

110%

INCREASE IN MONTHLY PHYSICAL ACTIVITY

inactivity. Vitality has seen tremendous results in both
increased physical activity and overall program engagement across all health risk groups.

- **Vitality Active Rewards**, accessed through our free smartphone app, gives members dynamic weekly physical activity goals and a spin of an online wheel for Vitality Points or e-gift cards each week an activity goal is met.

- **Gym and Wellness (weight loss and smoking cessation) Rebates** improve members' access to the well-being resources available to them.

- **Fitness Device Subsidies and Mall Gift Card Coupons**, which can be tied to specific engagement criteria.

As a best practice, we recommend offering the mall, Earn Apple Watch and Vitality Active Rewards combined, as these options together drive weekly, monthly and year-over-year engagement, as well as target both physical activity and overall program engagement.

**Included at no additional fee** are Vitality Squares and HealthyFood. **Vitality Squares**, a monthly online game similar to a virtual scratch-off jackpot, has been proven to cause spikes in program activity at the beginning of each month, driving members back to the website (gift cards won through Vitality Squares are funded by Vitality). Additionally, our **HealthyFood** program provides discounts on healthy purchases through Walmart (funded by Vitality), as well as Vitality Points for healthy purchases at over 70 grocers nationwide.

Our history and research allow us to understand how to leverage incentives better than anyone in the industry. With a variety of reward options and configurable incentive structure, Vitality can help the District create an incentive design that aligns with your overall budget and goals, while also targeting specific population characteristics and engagement objectives.

---

34%

Increase in long-term member engagement through use of best-practice incentive strategies

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*2017 Vitality Engagement Study - by measure of progression into higher Vitality Status*
CONNECT

While employers may offer a variety of resources for their employees to utilize, there often isn’t an approach that meaningfully connects employees to the offering that will benefit them most. Inevitably, this creates confusion and lack of program awareness.

So how do employers optimize their investments in these benefits, and connect employees to the right resources at the right time? By delivering more than a technology solution. Our Gateway solution makes health personal, connecting employees to the right resources at the right time.

To remove engagement barriers for our members, we have set up integrated partnerships with prominent names in physical activity tracking (e.g., Fitbit, Garmin, Polar, Apple, MapMyFitness), industry-leading biometric screening networks (e.g., Quest Diagnostics, Clinical Reference Laboratory), mindfulness meditation apps (Headspace, Calm, Apple Breathe), telephonic coaching (TrestleTree), reward partners (e.g., Amazon, Nike, Fandango), as well as Walmart and 70+ grocery store chains around the country for healthy food purchases.

Employers can choose from our breadth of curated resources and vendors or can feature their own benefits and program offerings. Gateway will seamlessly integrate these offerings, supported by our expertise in behavioral science to drive deeper engagement. Gateway will meet the employee where he or she is, and when he or she is ready, based on the employee’s individual health status, personalized pathway, lifestyle decisions and engagement activity with us.

Gateway is offered at an additional PEPM fee, added on to the core administration fee quoted in this proposal, we are happy to work with you to better understand your third-party vendors and provide a quote.

Vitality Gateway can incorporate the District’s third-party vendors and other employee benefits/initiatives into our platform in the following ways:

- **Promote**: Details on and/or links to District offerings can be promoted through the dynamic homepage promotion tiles, Points Planner, newsfeed and in-app mobile notifications.

- **Steer**: In addition to general promotion, at-risk members’ Health Results Report and targeted messaging further guide members to relevant program offering details.

- **Motivate**: Points and/or other rewards can be awarded to members for participation with the offerings. Participation can be tracked through Employer-uploaded files in Vitality’s standard format, a member self-submission mechanism with documentation, or a direct data exchange with the third party.

- **Connect**: Through the mobile app, Guide to Vitality and Employer Resources page, members can access program details, links and single sign-on capabilities that can easily connect them to the relevant programs and assist in managing their health risk or condition.
ANALYZE

A well-intentioned well-being program will not have the desired impact without strong initial setup, program support and a tailored approach for each employer. As such, we leverage data and resources in a way that is unmatched in the industry. We use our findings to help build a program aligned with achieving the outcomes our clients desire, and therefore ensuring every dollar invested with Vitality is better spent than with any other well-being company.

Our Certified Corporate Wellness Specialist Implementation Managers are solely dedicated to launching new clients and are therefore experts in the logistics involved in successfully implementing Vitality. Your designated Implementation Manager will create structure, offer guidance and manage all activities in preparation for launch. He or she will work with you, internal systems departments and other vendors to ensure all file feeds, data integration and incentive decisions are implemented smoothly. Most importantly, he or she will go to great lengths to understand your specific needs and goals, any past successes and areas for improvement, additional programs and/or benefits you leverage for your employees and what you’re looking to accomplish through our partnership. Your Implementation Manager will work with you to build a program that is tailor-made to fit your unique population.

Your Wellness Strategy Manager (WSM) will be involved in your program implementation from day one, allowing him or her to get the full picture of your organization and goals prior to launch. As more than an account manager, your Wellness Strategy Manager is also a Certified Corporate Wellness Specialist and will serve as a true, ongoing consultative resource for the District to proactively and carefully strategize on all wellness initiatives year-over-year. Your WSM will:

- **Consult:** Hold monthly calls, relay best practices, train the trainer
- **Develop:** Create engagement plans, identify focus areas, collaborate with HR team
- **Coordinate:** Liaise between you and internal support teams and partners
- **Execute:** Follow through on service deliverables, make on-site visits
- **Evaluate:** Review aggregate results, make recommendations

9/10

AVERAGE RATING CLIENTS GIVE THEIR WELLNESS STRATEGY MANAGERS

Vitality reporting is in a class of its own in the industry, as it comes from an actuarial product shop for well-being — built by, run by and reported by actuaries with a focus on data and proven results. We use over 35 million member years of Vitality data to design a product that appropriately weighs activities and outcomes to enhance the financial and motivational success of the Vitality program for our clients. We then leverage this research to uncover what truly leads to behavior change (specific communications, incentives, etc.) and provide codified best-practices to support the District's program goals. We use the District data — including behavior change, risk transitions and engagement down to the location and/or subgroup level — to help drive strategy and to determine the most effective ongoing program for your unique population. We use external data — such as best-in-class industry research and geographic statistics on health risks — to analyze challenges that face your population from outside the walls of your organization.

We pride ourselves on our steadfast dedication to the science and validity of our program and our research-focused approach, as evidenced by our collaborative research with behavioral science leaders around the world.

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9 2017 Wellness Strategy Manager Vitality Client Survey
Data is analyzed early and often. Our reports include **early insights** from pre-launch through the first two months after launch, which equip all parties with the key information needed to develop an appropriate, strategic roadmap from the outset of the program. Our comprehensive, client-specific reporting suite provides an in-depth and frequent view into metrics such as:

- member engagement and verified activity completion
- member health risks and transitions over time
- behavior change milestones
- claims savings
- incentive management

Your Wellness Strategy Manager, coming from a team of experts certified in the field of corporate wellness or health education, leverages these reports on an ongoing basis and will proactively work with you to adjust your program strategy as the evidence and data dictate, guiding the strategy of your program in real-time and optimizing your investment. We create shared value based on what is important for each individual client, supported by our core purpose of improving your population's health.

92%

Increase in activity levels in 3 years at our client, McKesson\textsuperscript{10}
## VITALITY FEE SUMMARY

### CORE FEES

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Unit Cost</th>
<th>Fee Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation Fee&lt;sup&gt;11&lt;/sup&gt;</td>
<td>$9,750</td>
<td>One time</td>
</tr>
<tr>
<td>Kickoff call introducing implementation process and timeline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligibility file feed setup and guidance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incentive design consultation and setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration Fee for 3,100 eligible employees&lt;sup&gt;12&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$3.25</td>
<td>Employees Only</td>
<td></td>
</tr>
<tr>
<td>$3.65</td>
<td>Including Spouses/Partners</td>
<td></td>
</tr>
</tbody>
</table>

Per Employee Per Month (PEPM) Year 1
Annual increase capped at CPI-U<sup>13</sup>

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online well-being platform</td>
<td></td>
</tr>
<tr>
<td>Actuarially-driven reporting</td>
<td></td>
</tr>
<tr>
<td>Suite of assessments including Vitality HRA</td>
<td></td>
</tr>
<tr>
<td>Vitality Today smartphone app, including gym check-in technology</td>
<td></td>
</tr>
<tr>
<td>Configurable platform with ability to include client-specific communications, information and branding</td>
<td></td>
</tr>
<tr>
<td>Incentive design, management and fulfillment</td>
<td></td>
</tr>
<tr>
<td>Online health education and interactive tools</td>
<td></td>
</tr>
<tr>
<td>Vitality Squares gamification engagement driver</td>
<td></td>
</tr>
<tr>
<td>Healthy Kids program</td>
<td></td>
</tr>
<tr>
<td>Vitality HealthyFood network</td>
<td></td>
</tr>
<tr>
<td>Robust communications package</td>
<td></td>
</tr>
<tr>
<td>Vitality challenges platform with social networking capabilities</td>
<td></td>
</tr>
<tr>
<td>Personal Pathways and goals to individualize the member’s well-being journey</td>
<td></td>
</tr>
<tr>
<td>Monthly and quarterly health promotion webinars and campaigns</td>
<td></td>
</tr>
<tr>
<td>Ongoing account management, including consultative planning and best practices</td>
<td></td>
</tr>
<tr>
<td>Vitality Champs program tools and facilitation</td>
<td></td>
</tr>
<tr>
<td>Employer Portal access</td>
<td></td>
</tr>
<tr>
<td>Fitness device integration</td>
<td></td>
</tr>
</tbody>
</table>

**Physician Forms**
Per Member Submitting Form

### OPTIONAL/MISCELLANEOUS FEES

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Unit Cost</th>
<th>Fee Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Manager Travel</td>
<td>Varies</td>
<td>Pass-through cost</td>
</tr>
<tr>
<td>Single Sign-On (SSO)</td>
<td>$5,000</td>
<td>One time per SSO</td>
</tr>
</tbody>
</table>

Optional Gateway platform added to administration fee on a PEPM basis
Within Gateway, for any direct data file exchange not in Vitality file format, additional setup costs apply ($5,000 initial setup, $1,500 annual maintenance thereafter). For any direct data file exchange in Vitality’s standard format, there are no additional costs. Biometric screening data must be in Vitality’s standard format.

Incentives
Variety
Monthly pass-through cost

Incentive management, tracking and fulfillment are included as part of our core services. Optional incentives listed below are billed as a pass-through cost as rewards are redeemed.

- Mail (High, Standard or Low Level)
- Vitality Active Rewards
- Gym Rebate
- Wellness Rebates (smoking cessation & weight loss)
- Fitness Device Subsidy
- Earn Apple Watch $0.12
Per Employee Per Month (spouses not included in benefits)
In addition to the PEPM increase, the District will be billed for each Watch purchaser each month the difference between the maximum monthly payment (e.g., $12.50 for Apple Watch Series 3) and the payment due from the member

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<sup>11</sup> Three years is our standard contract term. If a shorter contract term is desired, a higher implementation fee will be charged. Contract must be signed or implementation fee must be paid prior to the start of implementation.

<sup>12</sup> Our pricing is volume-based. If the number of employees changes prior to the time of launch, a different PEPM rate may apply. Additionally, Vitality will require a minimum employee count throughout the contract term, based on the size of the population at launch. Pricing is valid 120 days from date of quote.

<sup>13</sup> The consumer price index of consumer goods and services of urban households; historically averages around 2%.
Performance Guarantees

We will place a total of 20% of our membership and implementation fees at risk and provide the District with the flexibility to determine the appropriate allocation level for each performance standard category. The default allocation is shown below:

<table>
<thead>
<tr>
<th>SERVICE-LEVEL GUARANTEE</th>
<th>20% of our membership and implementation fees at risk¹⁴</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Service-level Guarantees</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Implementation</strong>: Meet committed deadlines.</td>
<td>20% of implementation fee</td>
</tr>
<tr>
<td><strong>Timely Reporting</strong>: Monthly report delivered within one month of the end of the reporting period. Quarterly report delivered within two months of the end of the reporting period. Annual report delivered within two months of the end of the reporting period. Service Threshold: 95%.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Website Availability</strong>: Members are able to log into the Vitality website; excludes scheduled maintenance. Service Threshold: 98%</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Call Center Performance</strong>: 80% of calls answered in 20 seconds.</td>
<td>4% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Customer Service Performance</strong>: Customer Service Email &amp; Fax Responses – Response within two business days. Service Threshold: 80%</td>
<td>4% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Participant Satisfaction</strong>: Positive net promoter score. Measured quarterly.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
<tr>
<td><strong>Risk Reduction Outcomes</strong>:¹⁵ Healthcare trend for the engaged population is less than the non-engaged population after three years.</td>
<td>3% of administration fees (PEPM)</td>
</tr>
</tbody>
</table>

¹⁴ Guarantee applies for the initial contract term.

¹⁵ Maximum amount in this category will be limited, based upon incentive construct selected. The client must be able to provide Vitality Group with sufficient claims data to administer the guarantee. The Risk Reduction Outcomes guarantee is only provided to groups with more than 3,000 employees.
ADDITIONAL DETAILS

We understand that the District has specific interest in the areas listed below. We have provided further information on these program aspects in this section, and are happy to provide additional information upon request.

- Biometric Screenings
- Physical Activity Tracking
- Mental Well-being Resources
- Financial Resources
- Nutrition Resources
- Social Aspects
- Coaching
- Smoking Cessation
- Vitality Contribution Manager Incentive Tool
- Rewards
- Implementation and Wellness Strategy Management
- Vitality Champs and Employer Portal
- Communication Resources
Biometric Screenings

Because verified biometric data is critical to the success of a well-being initiative, Vitality offers unparalleled member access and operational efficiency when implementing a biometric screening program. We allow members to submit screening data through onsite events, our national partner lab network, a biometric screening vendor of the District’s choice, or members’ own personal physicians.

We offer integrated onsite biometric screenings, called Vitality Checks®, at a discounted rate through our partnerships with Quest Diagnostics and Clinical Reference Laboratory (CRL). The results are transmitted to Vitality electronically and are directly uploaded into each member’s individual Vitality account, overriding missing or self-reported HRA values. For members who are unable to attend onsite screenings through one of our partners, they will have access to Quest or CRL’s expansive national lab network, which is also integrated with Vitality.

If the District has a preferred biometric screening vendor other than Quest or CRL, Vitality can integrate with the third party to receive biometric results data into the portal for an additional fee. This is an excellent option for employers with onsite clinics, specific vendors covered by medical insurance or preferred vendor relationships.

We also support physician forms as a supplement to clients’ onsite biometric screenings and our integrated screening network for $3 per member submitting a form. Members can submit information to Vitality using a form that can be printed out from Vitality’s website and provided to their physician to complete. Once members have received biometric results from their physician, they can email, fax, or upload (via the member portal or Vitality Today smartphone app) the results to Vitality.

In total, members have access to over 2,000 locations nationwide for biometric screenings that are automatically integrated with Vitality. The standard screening panel includes cholesterol (total, HDL and LDL), glucose, triglycerides, blood pressure, height, weight, waist circumference, body mass index and cotinine. For a breakdown of what our screening partners offer, and respective fees, please see below.

<table>
<thead>
<tr>
<th></th>
<th>COST INCLUDING COTinine (VENIPUNCTURE)</th>
<th>COST EXCLUDING COTinine (VENIPUNCTURE)</th>
<th>COST INCLUDING COTinine (FINGERSTICK)</th>
<th>COST EXCLUDING COTinine (FINGERSTICK)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quest Diagnostics</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onsite</td>
<td>$56.00</td>
<td>$46.00</td>
<td>N/A</td>
<td>$46.00</td>
</tr>
<tr>
<td>Clinic (2,000+ locations)</td>
<td>$55.00</td>
<td>$45.00</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Clinical Reference Laboratory (CRL)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onsite</td>
<td>$46.00</td>
<td>$42.00</td>
<td>$52.00</td>
<td>$49.00</td>
</tr>
<tr>
<td>Clinic (1,350+ locations)</td>
<td>$71.00</td>
<td>$67.00</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Physical Activity Tracking

FITNESS DEVICE INTEGRATION

The concept of tracking well-being activity (to stimulate behavioral change) in a verifiable manner is a cornerstone of Vitality’s approach to health promotion.

Vitality leverages the latest technology to provide verifiable workout tracking through integration with over 100 fitness devices. Members receive points for using the devices they already have, rewarding both exercise and sporting activity (e.g., tennis, cycling), while also making small adjustments toward healthier lifestyle activity, such as taking the stairs or enjoying a quick walk during lunch. Vitality is able to accept a number of verified metrics, including steps taken, average heart rate and calories burned, allowing members to track their workouts in a way that meets their activity preferences and/or needs.

16 Waist circumference is available upon request for an additional charge from CRL and Quest. Cotinine is an optional screening component for Quest and CRL. Partner pricing is subject to change. For onsite screenings, a minimum number of participants may be required, and fees may be assessed by the screening provider for travel costs, no-shows, additional personnel for registration staffing, etc. Onsite venipuncture screenings are not available in Massachusetts. A number of states may include additional fees and/or limitations regarding fingerstick screenings. Please see your Vitality representative for details.
For members using Apple’s health and fitness companion, Apple Watch, they can also track Active Calories that they burn throughout the day, monitoring their progress toward a verified workout through the watch’s Move Ring.

We also provide employers with the ability to offer subsidized fitness devices to their members. Vitality completely manages the ordering process and distribution through the platform, leaving no administrative burden on the employer.

SMARTPHONE INTEGRATION
Through our direct integration partnership with MapMyFitness, members earn points for activity verified by this smartphone app. Additionally, members can submit recorded steps and/or biometric data captured via Apple Health.

Finally, because we believe in making participation as easy and accessible as possible, members can record verified gym workouts with the click of a button using the Vitality Today smartphone app’s “check-in” technology. Our app also allows members to earn points for completing a sporting event or participating in a sports league by simply snapping a picture of documentation through their smartphone camera verifying the event/league.

We understand the importance of physical activity in achieving personal goals, so Vitality strives to provide our members with a multitude of ways to record and celebrate their workout accomplishments.

PHYSICAL ACTIVITY REVIEW
Vitality also understands the importance of regular physical activity to an individual’s overall health, and that’s why we want to help everyone find the best way to fit more physical activity into their lives and get rewarded for it. Vitality’s Physical Activity Review helps a member explore their preferences for being active, their current activity levels and their readiness to expand beyond their current level of physical activity. Upon completion of the assessment, we make specific recommendations based on their preferences and readiness to change, leading them to educational content and helpful links focused on ways to safely increase activity levels and overcome obstacles specific to their unique situation.

Mental Well-being Resources

MENTAL WELL-BEING REVIEW
Vitality addresses each member’s mental health with the Mental Well-being Review. Like the Health Risk Assessment, it’s performed individually online, and weighs a member’s emotional well-being in three key categories: sources of stress, social support network, and current psychological state. This is not a formal psychological diagnostic device, although it does borrow aspects of such mental tests; rather, it’s an awareness tool designed to generate recognition that there’s an important mental component to well-being.

The aim is to identify a member’s sources of stress and social support, and evaluate how those factors affect the member’s psychological well-being. Vitality then recommends specific educational content related to the member’s responses.

VITALITY HEALTHY MIND
In addition to the Mental Well-being Review, Vitality offers HealthyMind — a new feature that encourages members to improve their well-being by engaging in mental health-promoting activities. The key components of HealthyMind are sleep and meditation.

SLEEP
The importance of sleep is well-researched and studied. Poor quality sleep is linked to a range of conditions that impact morbidity and mortality, including: obesity, diabetes, hypertension and poor mental health\(^\text{17}\). In addition, according to the National Sleep Foundation, 95% of people use an electronic device within an hour of bedtime, and mobile phone use in that hour is linked to a poorer night’s sleep, drowsy driving and waking up feeling unrefreshed.

Through HealthyMind’s Sleep Well component, members are rewarded with Vitality Points for staying off their smartphone for 8 consecutive hours a night over a 30-day period. This encourages members to sleep the recommended 7 to 9 hours a night, as well as avoid the sleep-disrupting blue light emitted from the phone. This program is designed to challenge the member to focus for one month on improving their sleep habits, spurring the development of ongoing healthy sleep behaviors for the longer term.

\(^{17}\) https://www.cdc.gov/features/getting-enough-sleep/index.html
MEDITATION
Mindfulness meditation has long been shown to produce positive effects on psychological well-being. These extend beyond the time that a person spends performing the meditation. There are multiple ways to practice mindfulness meditation, but the aim is to achieve a state of relaxation through paying attention to one's thoughts and sensations, without applying judgment or analysis to them. Mindfulness meditation has been proven to:

- Help reduce stress
- Help manage chronic pain
- Reduce symptoms of depression and anxiety

- Lower risk of depression
- Improve sleep quality
- Improve working memory and cognitive flexibility

HealthyMind's meditation component rewards members with Vitality Points for using one of several supported mindfulness/meditation apps. Selected apps are top-rated, user-friendly and use scientifically-grounded techniques. At present, the integrated app experience includes: Headspace™, Calm™ and Apple® Breathe™. These tools give members clear direction and assistance with mindfulness meditation, making the practice accessible to all levels of experience.

Financial Resources
It is not uncommon for employees to report extreme financial-related stress. These individuals are twice as likely to report poor overall health, affecting their absenteeism and performance at work. We also know that employees often do not receive the appropriate support necessary to overcome financial troubles – our research has shown that most people report asking a friend or family member for financial guidance. Ultimately, financial stress negatively impacts the employer's organization and culture of well-being.

Recognizing the impact financial health has on the member's well-being, Vitality offers a comprehensive approach for helping members develop a better state of financial well-being. Members earn Vitality Points for setting goals related to their financial well-being, and engage with self-guided education resources on a variety of topics, including optimizing the use of employer resources, improving or maintaining a good credit score, developing skills for one's career, minimizing financial risk, ensuring proper insurance coverage (i.e., life, home/renter's and auto), having savings in case of an emergency and more.

Upon setting a goal, timely member communications occur, including: Mobile App Pushes with tips; newsfeed messages with valuable information and nudges for members to consider their progress as they work through their goal timeline. This includes ongoing tips on financial well-being, links to educational content, and interactive surveys and quizzes with tailored feedback for the member based on their individual responses.

Nutrition Resources
Vitality offers a variety of online nutrition courses (Achieve a Healthy Balanced Diet; Demystifying Fats, Sugar and Salt; Eating for Weight Management; Healthy Eating in a Modern World; Eating to Boost Energy Levels; Attain and Maintain a Varied Diet) designed to help members make better choices whether they’re eating at home or going out. In addition, for members with an out-of-range BMI, Vitality recommends goals suggesting that they lose or reach a target weight. As they work toward this goal, the member can earn even more points for taking one of Vitality's online nutrition courses, engaging in a virtual coaching session on weight management, completing a Decision Point to determine whether they should take weight loss medicine, participating in an ActionSet on making healthy choices while eating at restaurants and much more.

Additionally, we know that one of the biggest barriers to achieving a balanced lifestyle is the fear that healthy eating is ultimately too expensive. It's for this reason that Vitality offers HealthyFood™, a program that has been in existence on a global scale with our parent company, Discovery, since 2009.


19 All third-party product names, trademarks, and copyrights are the property of their respective owners and are not intended as endorsements or any other affiliation with Vitality. All such products, names and trademarks are used solely to identify examples of products currently compatible with Vitality Wellness Program.

Our exclusive partnerships are the first of their kind in the U.S. well-being arena. HealthyFood makes eating healthy more affordable and accessible for employees and their families by awarding members Vitality Points and real-time discounts on nutritional foods.

At no additional cost to the employer, employees receive up to 10% savings on healthy foods at 4,000+ Walmart stores throughout the country. Vitality members can increase their savings from 5% to 10% upon completion of a biometric screening, leveraging this unique member benefit to drive broader program participation.

The HealthyFood program provides another incentive to shop healthy by awarding Vitality Points for healthy food purchases. In addition to awarding points for healthy purchases at Walmart, our HealthyFood network allows Vitality members to earn Vitality Points for healthy food purchases at more than 8,000 locations of 70+ grocery store chains. This network is powered by our partner NutriSavings™ as an additional branch of our HealthyFood program.

Additionally, because Vitality feels strongly about reinforcing the message of participating in healthy habits, we offer weight loss wellness rebates as part of the incentive offering as a way to improve access to resources the members have available to them. Members meeting basic criteria are eligible, and the reward is earned when the member meets the set requirements.

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**Coaching**

Our pre-integrated partner for chronic condition management and telephonic coaching is TrestleTree. This is an optional component of the Vitality offering; pricing details are available below. TrestleTree believes that long-term, sustained behavior change is achievable for everyone, regardless of their level of motivation or readiness to change.

Their whole-person modeled Lifestyle Management and Disease Management programs can include:

- Tobacco cessation
- Obesity and weight management
- Exercise and nutrition
- Stress management
- Diabetes
- Asthma
- High blood pressure
- High cholesterol
- Metabolic syndrome
- CAD
- COPD

With the primary health coaching model, each participant is assigned his or her own Health Coach with whom to share their unique story during the duration of the coaching relationship, while also developing a comprehensive plan to improve their health. TrestleTree Health Coaches will engage these multi-faceted, at-risk individuals and help them with therapeutic lifestyle change and clinical modifications (e.g., medication adherence, reduction of gaps in screenings, etc.).

Any District member who has been identified as having health risks that overlap with the type of coaching TrestleTree offers will, within the Vitality portal, be provided with information suggesting enrollment in TrestleTree coaching. If the member enrolls and begins the coaching process, he or she will receive Vitality Points for participation. In addition, any the District member will see TrestleTree listed as a point-earning activity on the Vitality platform, which will include detailed information on how to self-enroll for coaching.

There is also an outreach component to the telephonic coaching enrollment process. If a member falls into a “high risk” category for a particular health area after completing the HRA, they will be shown a message stating that their company offers telephonic coaching, and they will be given the option to consent to receiving a call from a TrestleTree coach. This message satisfies the express consent required for outreach, per the Department of Health and Human Services’ regulations regarding the HIPAA Privacy Rule, and it is seamlessly managed by Vitality for TrestleTree clients.

TrestleTree telephonic coaching is billed on a per participant per month (PPPM) basis. A 10% discount is applied when LM and DM are both offered.
The District will be billed on a per-participant basis at the appropriate LM or DM rate for the type of coaching each participant requires. A ‘participant’ is defined as a Vitality member (employee and/or spouse/partner, if applicable) who has enrolled in the coaching program, and has completed their first coaching call. Monthly billing will occur for as long as that individual actively continues with the coaching program.

An overall monthly minimum fee will apply. Monthly minimum fees based on 3,100 members (spouses not included) are $2,500 if only Lifestyle Management is selected and $2,250 if both Lifestyle Management and Disease Management are selected. Each month the amount billed will be either the monthly minimum, or the monthly participant fees based on actual usage, whichever is greater.

**Tobacco Cessation**

LIVING SMOKE FREE

To address the persistent challenge of tobacco use, Vitality created our own online cessation program: Living Smoke Free. Uniquely designed with interactive and inspirational touchpoints following National Cancer Institute guidelines, Living Smoke Free incorporates evidence-based behavioral economics and incentives that will inspire members to quit tobacco for good.

In addition to cigarettes, Living Smoke Free addresses other forms of tobacco use (chewing tobacco, cigars, pipes, etc.). Over an eight-week period, members are engaged through personalized newsfeed interactions, educational resources and Vitality Today mobile app notifications. The first two weeks of the program focus on preparing to quit; subsequent weeks provide guidance and support along the way. This includes:

- Goal-setting and logging into the member portal on an ongoing basis to track personal progress and/or setbacks
- Triggered personalized information in the member’s newsfeed based on survey answers
- Messages, posts and mobile pushes with tips on handling cravings or mood problems, preventing relapses and avoiding weight gain
- Links to other tobacco-related resources
- Details on cessation aids
- Monday motivations and weekly round-up messages

Living Smoke Free can be completed through the Vitality member portal, mobile app, or a combination of both.

Newsfeed posts and the message center within the member portal make it easy for participants to track their progress. Upon program completion, tobacco users are awarded for the Reasonable Alternative Standard for a positive cotinine test; weekly points are also awarded for checking in on tobacco-related goals.

By holding members accountable for tobacco use and awarding for sustained engagement in Living Smoke Free, Vitality is also driving participation in other program components as members regularly log into the member portal and/or mobile app.

**GATEWAY: INTEGRATING THIRD-PARTY TOBACCO CESSATION PROGRAMS INTO VITALITY**

Vitality’s Gateway solution seamlessly integrates employer offerings such as third-party tobacco cessation programs, supported by our expertise in behavioral science to drive deeper engagement. Gateway will meet the employee where he or she is, and when he or she is ready, based on the employee’s individual health status, personalized pathway, lifestyle decisions and engagement activity with us.

For an employer who wishes to incorporate third-party tobacco cessation programs into the Vitality platform, this can include:

- Awarding Vitality Points for participation with tobacco cessation programs managed by a third party, and promoting the service within the Vitality member experience for at- or high-risk participants.
- Requiring tobacco users to participate in tobacco cessation programs as part of their employer’s Vitality Contribution Manager (VCM) incentive criteria.
employer reporting shows which members have met the criteria. This information can be used to fulfill the rewards or penalties allocated by the employer (e.g., premium adjustments, tobacco surcharges, etc.).

Gateway is offered at an additional PEPM fee, added on to the core administration fee quoted in this proposal; we are happy to work with you to better understand your third-party vendors and provide a quote.

Vitality Contribution Manager

The Vitality Contribution Manager™ (VCM) is a highly configurable incentive mechanism that can be leveraged for targeted emphasis on specific engagement and/or outcomes criteria. Vitality encourages our clients to look at their well-being structure and incentive design as a multi-year strategy. We support each client in evolving their program into one with increasing emphasis on depth of engagement and/or outcome-based measurement, while providing a solution that requires little administration from the District.

Our VCM solution provides the employer with significant flexibility to tailor requirements as well as the overall strategy to each population's needs. You have the ability to vary criteria for new hires and/or spouses/partners, as well as by branch.

Criteria for the VCM can include one or a combination of the options below:

3. Should manage complexity to make it easy for the employee to understand and the employer to administer
4. Must have an ethical design
5. Must be compliant with regulation
6. Should support a multi-year strategy

DEFINING BIOMETRIC REQUIREMENTS

The District can focus on one biometric measurement, or several. All default outcome ranges in the Vitality program are based on standard clinical guidelines; however, the employer can customize specific biometric requirements for the VCM. During implementation, we'll work with the District to ensure your requirements are clinically sound and meet ACA standards.

ALTERNATIVE STANDARDS FOR VCM CRITERIA

In compliance with ACA regulations, the Vitality program was created with built-in alternative standards for members with out-of-range biometric measurements. Within your VCM strategy, the District has the option of incorporating other alternative standards linked to the completion of specific Vitality activities (e.g., our nutrition courses) or, through the Gateway integration offering, linked to the engagement with external programs (e.g., a third-party tobacco cessation program).

VCM REPORTING

Regardless of the VCM structure selected, Vitality will provide reporting to the District showing which members have met the VCM requirements. You can use this information to fulfill the rewards or penalties allocated by the District (e.g., premium adjustments, HSA contributions, dollars, gift certificates, paid time off days, tobacco surcharges, etc.). Some of our clients offer different levels of incentives as the member finishes more requirements – we can accommodate this kind of “tiered” structure as well.

SAMPLE VCM STRATEGIES

One sample multi-year strategy for incentive design could involve:

Year 1 – Incentive based on HRA and biometric screening completion
Year 2 – Incentive based on HRA and biometric screening completion, plus achievement of Silver Vitality Status

Year 3 – Incentive based on HRA and biometric screening completion, plus achievement of Gold Vitality Status

In this strategy, in the second and third years, Vitality Status – weaving together a wide variety of activities – drives long-term engagement with the well-being program as the area of primary importance. This helps promote deeper individual engagement each year.

A multi-year outcomes-based strategy can also be customized to the District’s needs. For example, if tobacco cessation is its top health priority for employees, but a gradual progression to incorporate additional outcomes is desired, a strategy could involve:

Year 1 – Incentive based on demonstration of tobacco-free status (or reasonable alternative standard)

Year 2 – Incentive based on demonstration of tobacco-free status and BMI in range (or reasonable alternative standard)

Year 3 – Incentive based on demonstration of five key biometric outcomes (glucose, BMI, blood pressure, cholesterol, tobacco-free) in range (or reasonable alternative standard); tiered incentive payout structure available

This strategy allows a client to step gradually into an outcomes-based structure, with increasing emphasis on additional health risk factors each year. The Vitality program is designed to support outcomes-based structures like the one above with a highly configurable, fully ACA-compliant program design and comprehensive employer reporting package.

POTENTIAL OFFSET FROM THE VITALITY CONTRIBUTION MANAGER

One way to help offset some of the costs of the program is by implementing the VCM. This approach can reduce annual costs to you through employee contribution adjustments, while encouraging employee accountability for lifestyle choices.

The District has the option of varying contribution based upon Vitality Status or the criteria of your choice (such as completion of the HRA and/or a biometric screening; outcomes-based structures are also available). We have calculated one example varying contributions by Vitality Status and HRA completion during all three years in a manner that serves as a funding source for the program:

<table>
<thead>
<tr>
<th>VITALITY STATUS</th>
<th>MONTHLY CONTRIBUTION ADJUSTMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze &amp; HRA Not Completed</td>
<td>-$30</td>
</tr>
<tr>
<td>Bronze &amp; HRA Completed</td>
<td>$0</td>
</tr>
<tr>
<td>Silver</td>
<td>-$10</td>
</tr>
<tr>
<td>Gold or Platinum</td>
<td>-$20</td>
</tr>
</tbody>
</table>

The Vitality Status distribution assumption supporting the estimates in this document is shown below. Participation rates can vary significantly by client; the Low, Medium and High scenarios represent engagement at the 25th, 50th and 75th percentile across our book of business.

<table>
<thead>
<tr>
<th>VITALITY STATUS</th>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze</td>
<td>80%</td>
<td>69%</td>
<td>52%</td>
</tr>
<tr>
<td>Silver</td>
<td>16%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Gold</td>
<td>3%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Platinum</td>
<td>1%</td>
<td>3%</td>
<td>8%</td>
</tr>
</tbody>
</table>
For context, these scenarios are approximately equivalent to the HRA and screening participation rates below:

<table>
<thead>
<tr>
<th>VITALITY STATUS</th>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>HRA Completed</td>
<td>36%</td>
<td>45%</td>
<td>59%</td>
</tr>
<tr>
<td>Screening Participation</td>
<td>20%</td>
<td>31%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Based on this approach and our prior experience with client engagement, if you were to implement the Vitality Contribution Manager in this manner, we estimate that the District would experience the following annual cost offset:

<table>
<thead>
<tr>
<th>Potential Offset from Contribution Adjustments</th>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$624,960</td>
<td>$468,720</td>
<td>$215,760</td>
</tr>
</tbody>
</table>

To calculate the expected offset amount, we use the engagement profile and adjustment structure above. For each year/status combination, total offset amount = (% engagement) * (# of employees) * (additional Monthly EE contributions) * (12 months). We then sum up the totals over all status levels by year to arrive at the total dollar amount. The effect of this potential offset on net costs is shown below:

<table>
<thead>
<tr>
<th>TOTAL COST (SAVINGS) SUMMARY</th>
<th>LOW</th>
<th>MEDIUM</th>
<th>HIGH</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEPM Administration Fees, including Implementation Fees</td>
<td>$130,650</td>
<td>$130,650</td>
<td>$130,650</td>
</tr>
<tr>
<td>Potential Offset from Contribution Adjustments</td>
<td>($624,960)</td>
<td>($468,720)</td>
<td>($215,760)</td>
</tr>
<tr>
<td>ANNUAL NET COST (SAVINGS)</td>
<td>($494,310)</td>
<td>($338,070)</td>
<td>($85,110)</td>
</tr>
</tbody>
</table>

The additional budget dollars generated in this approach (shown as savings above) can then be allocated toward rewards/incentives in the following year to increase engagement in the program.

Rewards

THE MALL
The mall is an online shopping site accessed through the Vitality platform, used by many of our clients to drive engagement. If the District elects to include the mall as a reward option, members' Vitality Points turn into Vitality Bucks, where members can access rewards such as:

- Gift Cards for Popular Retailers
- Fitness Devices
- Movie Passes

Some people are motivated by instant gratification while others are motivated by aspiring toward large-value items. Therefore, upon completion of an activity, Vitality Bucks are immediately available to be spent or can be carried over from year to year, thereby appealing to individuals with either a spender or a saver mentality.

The monetary value of a Vitality Buck can be set to one of three levels (low, medium or high) to align with a client's budgetary goals. Mall purchases are billed back to the client monthly on a pass-through basis. If desired, the District can also offer your members subsidies on fitness devices and/or gift card coupons through the mall to further drive engagement or reward specific achievements (e.g., achievement of status, HRA completion, etc.).

EARN APPLE WATCH
Through this optional reward, each Vitality member has the option to fund the purchase of an Apple Watch through their physical activity. After paying an upfront activation fee of as little as $9 (plus taxes) for Apple Watch Series 1 or $29 (plus taxes) for Apple Watch Series 3-GPS, the member receives Apple Watch. Over the next 24 months, the amount the member pays for their Apple Watch is based on the number of workouts they complete in the previous calendar month. If they earn enough Vitality Points for verified Standard or Advanced workouts, they can reduce their monthly payment, or pay nothing at all. As with many elements of the Vitality program, behavioral economic theory underpins the design. This particular aspect leverages the principle of loss aversion - because the employee is paying only a nominal cost to get access to Apple Watch, they are likely to perceive remaining payments as a "loss," creating a powerful motivation for them to get more active to reduce the payment and not "lose"
money. The fact that the member has pre-committed to the benefit is also a strong behavioral driver.

<table>
<thead>
<tr>
<th>Apple Watch Series 1 – Cost per Month based on Points Earned Through Achievement of Standard and Advanced Workouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 points</td>
</tr>
<tr>
<td><strong>Member</strong></td>
</tr>
<tr>
<td>$10</td>
</tr>
<tr>
<td>$8</td>
</tr>
<tr>
<td>$5</td>
</tr>
<tr>
<td>$0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Apple Watch Series 3 (GPS) – Cost per Month based on Points Earned Through Achievement of Standard and Advanced Workouts</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 points</td>
</tr>
<tr>
<td><strong>Member</strong></td>
</tr>
<tr>
<td>$12.50</td>
</tr>
<tr>
<td>$10</td>
</tr>
<tr>
<td>$6</td>
</tr>
<tr>
<td>$5</td>
</tr>
</tbody>
</table>

If the District adds Earn Apple Watch program, there is a per-employee-per-month (PEPM) administration fee increase of 12 cents if only employees can buy an Apple Watch or 15 cents if both employees and spouses can buy an Apple Watch (assuming spouses are included on the Vitality program). In addition, for each Watch purchaser each month, the District is billed the difference between the maximum monthly payment (e.g., $12.50 for Apple Watch Series 3) and the payment due from the member (based on their number of Standard/Advanced Workout points that month), as shown in the graph above.

VITALITY ACTIVE REWARDS
The gamification of physical activity is a key underpinning of Vitality Active Rewards. The engaging user journey is managed through the Vitality Today app on the member’s iPhone or Android phone21. All Vitality members receive weekly incentives for achieving a dynamic physical activity target each week. The points target is earned through Standard or Advanced workouts. If a member achieves their target for the week, they get to spin the Vitality Wheel and earn Vitality Points or an e-gift card from vendors like iTunes, Starbucks, Amazon and others. Costs for gift cards won through Active Rewards are billed directly to the employer each month.

GYM AND WELLNESS REBATES
Because Vitality feels strongly about reinforcing the message of participating in healthy habits, we offer gym rebates to improve members’ access to the well-being resources available to them. As part of this optional incentive offering, the District has the flexibility to determine the rebate dollar amount as well as the number of workouts required to qualify for the benefit. We can also ensure the members rebate does not exceed their annual gym dues. During the implementation process, the District’s Vitality Implementation Manager will work with you to design a model that best fits your population. Additionally, the rebate amount and/or workout requirements can be adjusted each program year, as desired by the District. Your Vitality Account Manager will provide ongoing guidance based on company-specific participation and objectives.

The Vitality portal makes it easy for each member to track their personal progress toward achieving their employer’s required number of workouts via the workout counter (e.g., 15 of 48 required workouts completed, 48 of 48 required workouts completed). Upon completion of the requirements, the member receives a celebratory message from Vitality including instructions on how to apply for the gym rebate. As part of the gym rebates offering, Vitality applies behavioral economics in a way that promotes both short- and long-term behavior change with a variety of awards for small, daily activities that add up to bigger changes over time. While extrinsic (financial) motivation is used to drive engagement in Vitality, our goal is to shift those members to more intrinsic motivation over the long term.

We also offer employers the opportunity to provide members once-per-lifetime smoking cessation and weight loss rebates to help offset the cost of qualifying programs or FDA-approved medication for smoking cessation.

REWARDING MEMBERS THROUGH GAMIFICATION: VITALITY SQUARES
As a gamification element of our offering, Vitality Squares™ drives members to the platform to play each month, leveraging this fun activity as a means to promote continued interaction with the Vitality platform and other online aspects of Vitality.

Vitality Squares is a monthly online game of hidden tiles, similar to a virtual scratch-off jackpot. Prizes include Vitality Points as well as gift cards (gift cards are paid for by Vitality Group). Differentiating rewards by Vitality Status leverages the fear of regret as a motivator to increase engagement. Also, game repetition nudges members to develop positive associations with healthy foods and negative associations with unhealthy choices.

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21 Vitality members who are Android or iPhone users can participate in Active Rewards using the Vitality Today app. Points for verified workouts can be tracked on any fitness device integrated with Vitality.
Since this feature launched, our member activity data reinforces the intention that members will play Squares and then continue navigating the platform to participate in other online aspects of Vitality. We see a surge in overall engagement and activity within the first few days of each month (a new game of Squares is unlocked each month), demonstrating the power of the game mechanics leveraged in this program component.

Implementation and Wellness Strategy Manager

IMPLEMENTATION
Implementation plays a key part in getting your program “up and running” by providing an Implementation Manager to create structure, offer guidance and manage all activities in preparation for launch. The Implementation Manager works with you, internal systems departments and other vendors to ensure all file feeds, data integration and incentive decisions are implemented smoothly and in the spirit of your long-term strategy and goals.

Our standard implementation is 90 days and includes the following activities:

<table>
<thead>
<tr>
<th>Month</th>
<th>Week 1</th>
<th>Kickoff call, including introduction to your Account Manager and dashboard walk-through</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Week 2</td>
<td>Eligibility file specs, rules and FTP setup form</td>
</tr>
<tr>
<td></td>
<td>Week 3</td>
<td>Biometrics planning, including introduction to screening vendor</td>
</tr>
<tr>
<td></td>
<td>Week 4</td>
<td>Marketing strategy discussion and introduction to member communications</td>
</tr>
<tr>
<td>Month</td>
<td>Week 5</td>
<td>Incentive design consultation</td>
</tr>
<tr>
<td></td>
<td>Week 6</td>
<td>Vitality Contribution Manager</td>
</tr>
<tr>
<td></td>
<td>Week 7</td>
<td>Member outreach/engagement strategy discussions begin</td>
</tr>
<tr>
<td></td>
<td>Week 8</td>
<td>Additional integrations (may need to begin earlier)</td>
</tr>
<tr>
<td>Month</td>
<td>Week 9</td>
<td>Critical milestones completed: eligibility, contract signed, rewards determined</td>
</tr>
<tr>
<td></td>
<td>Week 10</td>
<td>Launch strategy and final communications questions</td>
</tr>
<tr>
<td></td>
<td>Week 11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Week 12</td>
<td></td>
</tr>
</tbody>
</table>

LAUNCH PROGRAM

ACCOUNT MANAGEMENT
Vitality views account management as a critical component of success of the program and engagement of your population. As part of our ongoing training and professional development initiatives, all Wellness Strategy Manager (WSM) Team members have received either the Certified Corporate Wellness Specialist Certification (CCWS) or the Certified Health Education Specialist (CHES) designation. We require that all our WSMs have at least two years of experience in an account management role within the well-being industry. Each WSM is cross-trained on a variety of client populations and engagement approaches to the Vitality program, which ensures a well-rounded approach for the District's program. Ongoing training includes continuing education on health and well-being regulations, guidelines and legal compliance. We ensure all WSMs have exposure to different types of engagement strategies through the consistent internal sharing of best practices.

The District's WSM will interact with the District and employees onsite, as well as over the phone, through email and in webinars, educating and engaging them in the program. This individual will manage the client relationship, participate in onsite and virtual member education sessions, and assist in organizing employer worksite programs such as biometric screenings. Additionally, they'll work with the District to provide ideas, strategies and recommendations regarding communicating with members, well-being campaigns and a wide variety of activities to drive engagement. WSMs also assist with the recruitment of Vitality Champs, provide detailed education of the program and website navigation to accredit the Champs, and work with them throughout the program year to develop a calendar of events and activities.

The WSM assigned to the District conducts onsite education sessions to generate excitement around the program and to help employees understand and use all of the great benefits that are available to them. We can provide the education directly to your employees or use a “train-the-trainer”
approach. Onsite member education for two sites is included.

Challenges

The Vitality Challenges Platform is an engagement tool that taps into your population's competitive instincts and desire for camaraderie through fun participation in the workplace. Challenges focus on a range of activities already integrated into the program, igniting increased interest and commitment to Vitality as a whole.

The platform gives the District the ability to control and configure many aspects of the challenges directly through the employer portal, including:

- Setting the start and end date of the challenge
- Pre-assigning teams to allow for a challenge between departments or locations, or allowing members to create their own teams based on minimum/maximum team size requirements you set
- Sending messages to participants through the challenges portal

The social component of the platform allows members to message one another and write on discussion board walls, encouraging a community atmosphere and friendly competition among co-workers. Members can create and customize their own personal social profile which can include pictures, challenge history, Vitality Status, office location and other updates.

Once a challenge has begun, participants can view the challenge leaderboard, which displays the ranking of teams in the challenge, and each team's leaderboard, which shows the ranking of the individuals on that team. As the employer, you have on-demand access to reports on both the team and member level to show participation and progress.

These challenges integrate seamlessly with the Vitality program and capabilities, making the platform a major driver of engagement to the member portal. This fun, social mechanism will encourage the District members to participate, get healthier and have fun, while sustaining and increasing engagement over time.

Champs and Employer Portal

VITALITY CHAMP® PROGRAM
A critical component to driving engagement in the program is the establishment of an internal network of "Vitality Champs." The Vitality Champ program provides support to selected employees of the District to enable them to successfully promote Vitality to their coworkers. Champs are essentially well-being ambassadors, spreading the culture of health throughout your organization. This viral marketing approach is a critical ingredient to overall program success.

"One thing that's really worked well for us is having Vitality wellness champs at the local office level. We feel it's important that our wellness program is employee-driven, not corporate-driven.”

- Rosanna Ouellette-Pesicka, VP of Employee Systems and Services, Antea Group

Vitality Champs are provided with a host of different tools and resources to successfully promote the program, including:

- Assistance in the recruitment and identification of ideal Vitality Champs

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22 A site includes the use of a Vitality employee for one business day. An onsite visit may be exchanged for a business day of up to four member education webinars. Reasonable time for meals and short breaks must be provided for Vitality employees. Additional onsite education and/or webinars may be purchased with the approval of The Vitality Group. Travel expenses for onsite education sessions are not included and will be charged by Vitality at cost.
• Champ accreditations via teleconferences
• Vitality Champ Guide explaining how to be an advocate for the Vitality program
• Ongoing communication of ideas and best practices to help Champs achieve success
• Continuing education sessions and supplemental support for servicing and administration questions

EMPLOYER PORTAL
Employers and select Vitality Champs have their own distinct form of access to Vitality through the employer portal, also known as the Vitality Information Portal™. This access is a one-stop shop for a variety of program component information, including:

• Communications center – Where the District can find on-demand, personalized access to Vitality's comprehensive suite of member communication materials.
• Custom member messaging – Custom member messages for the home page and push notifications for the mobile app can be created, along with customization of the member platform feed, including the ability to provide employer-driven content and links.
• Awarding for participation in activities and specific events through Gateway – Employers/Vitality Champs can upload event participation, like attendance for an employer-sponsored blood drive, a lunch-and-learn, etc., to award members with Vitality Points for participation.

• Company challenges platform – The Challenges Platform can be accessed and administered through the employer portal. This is where the employer/Vitality Champ can set up and manage challenges for all employees or specific subsets of employees. Management of challenges also includes access to challenge reporting.

• Downloadable metrics and reports – Employers can log on — at any time — and access the following reports on the indicated frequency:
  o Member Status Report (on demand)
  o Activity Summary Report (on demand)
  o Website and Mobile App Login Report (on demand)
  o Activity Report (monthly)
  o Liability Report (monthly)
  o Rewards Report (monthly)
  o Challenge Reports (varies)
  o Health Risk Report (quarterly)
  o Operations Report (quarterly)
  o Vitality Contribution Manager Incentive Report (weekly, biweekly or monthly)

Communication Resources

VITALITY COMMUNICATIONS
Our aim is to meet members where they are by providing them with recommendations, messaging, goals and updates based on their specific profile (e.g., age, gender, risk factor, engagement level and activities). Example: If a member selects a goal to lose weight, they may receive a triggered newsfeed post recommending our nutrition courses. If they have already completed the nutrition courses, they will instead receive a post directing them to a different weight loss-related resource within the site.

These intelligent communications and interventions are embedded throughout the Vitality platform and are customized to speak to a member's full health profile, not just one piece of the puzzle. In this way, we speak to each member personally in a way that will resonate with them.

COMMUNICATION CENTER

Additionally, a key component of our program is delivering the most effective communications to your members through our on-demand online Communications Center. The District have the option of quickly accessing pre-made Vitality program designs for quick and easy distribution, or the ability to further customize your own program communications with easy-to-use templates. Communication pieces are available in various file formats to accommodate in-house quick print, outsource printing or email distribution.

Our goal in working with you is to provide the strategies and tools you need to successfully launch and reinforce program participation among your employees, build excitement for healthy lifestyles and create a culture of health within your organization. The District's WSM, a certified wellness specialist, will help build a program year communications strategy, outlining a plan to address and highlight your first-year objectives. This strategy is dynamic in nature, and your
WSM will continue to consult with you on best practices and on how to incorporate new data from program year reporting and feedback from Vitality Champs to be successful.

The following table includes examples of available messaging materials housed in the online Communications Center.

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Days Prior to Launch</td>
<td>Senior management can use the C-suite toolkit to announce the program and generate enthusiasm via email, desk drops or company intranet.</td>
</tr>
<tr>
<td>Launch Week</td>
<td>Customize and distribute emails, posters, flyers or postcards to employees to encourage them to register, take the HRA and begin planning a pathway to health with the online Points Planner.</td>
</tr>
<tr>
<td>Getting Started</td>
<td>Print posters and flyers on physical activity, fitness devices and nutrition or email full details on the options for employees to start earning Vitality Points.</td>
</tr>
<tr>
<td>Program Features</td>
<td>These promotional communications focus on activities such as Vitality HealthyFood, Healthy Kids and choice of Vitality Rewards, all working to drive engagement.</td>
</tr>
<tr>
<td>Social Sharing</td>
<td>Vitality encourages members to register for email campaigns of information and inspiration with tips on engaging in Vitality activities such as joining in the conversation on social media or posting a photo or story related to the monthly Health FYI webinar.</td>
</tr>
<tr>
<td>Program Year Transitions</td>
<td>Vitality coordinates push emails for program renewal and any program change information. Posters and flyers also remind employees of what happens with their Vitality Points, Status and Bucks.</td>
</tr>
</tbody>
</table>

In addition to the communications available in the Communications Center (examples described above), we have a multitude of additional marketing tools to help you engage your population:

- Triggered communications providing frequent, positive interactions that urge members along via automated email messages that welcome new members, offer encouragement and provide Vitality Point updates.
- Customized push notifications can be sent directly to members’ smartphones.
- The Vitality message center and home page alerts are ways to excite members to participate in an onsite wellness event or to drive engagement to certain components of the Vitality program.
- A C-suite tool kit and engagement strategy provide leadership with the tools and step-by-step guidance to become active participants and to engage and inspire employees.
- Through Twitter, Facebook, Instagram and LinkedIn pages, members can follow, interact with Vitality, read educational articles online, and feel motivated through success stories and encouraging words from others. The Vitality Virtual Training Club on Facebook is a prime example of a monitored site where Vitality experts can interact with members and support can be provided from one member to another. We also use social media such as Instagram to host several engagement tools for members.

NEWSFEED
As a further exploration of the Vitality Newsfeed, the District will have the flexibility to post text, pictures, files and links to the newsfeed, which is presented on each member’s homepage. An example of this could be sharing pictures from a recent company picnic or reminding employees about an upcoming challenge to register for. This allows the District to push employer-specific communications and information to the population at your own discretion.

In addition to this employer-driven functionality, Vitality posts personalized messages and content to each individual member’s newsfeed daily based on their interests, health profile, readiness to change and much more. As an example, as members set goals or link fitness devices to their Vitality accounts, they will see Newsfeed posts specific to these events and activities. Newsfeed posts use easy-to-understand and conversational language to celebrate personal achievements, share links to articles, hold surveys, introduce embedded videos and much more, providing fresh and personally relevant content in a variety of formats to keep members engaged and enthused.
OVERALL EMPLOYEE PARTICIPATION (CURRENT PROGRAM YEAR)

82.5% of current employees completed a Vitality Activity
66.8% of current employees completed a Vitality Health Review
42.4% of current employees completed a Biometric Screening

35.4% of current employees completed a Vitality Health Review and a Biometric Screening

VITALITY STATUS EARNED THIS PROGRAM YEAR

MONTHLY ACTIVITY COUNTS

9.6 average monthly activities* per employee during the current program year

Average Activities* per Employee

- 2013-2014
- 2014-2015

MONTHLY EMPLOYEE PARTICIPATION

75.0% of current employees have completed an activity* during the current program year

% Employees Completing Activities*

- 2013-2014
- 2014-2015

*Monthly activity counts exclude VHR completions, verified biometrics, and self-reported Healthy Habits
### CURRENT MEMBERSHIP AS OF 2/28/2015

<table>
<thead>
<tr>
<th></th>
<th>Overall</th>
<th>Employees</th>
<th>Spouses</th>
<th>Children</th>
<th>Employee Only</th>
<th>Spouses Only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5,675</td>
<td>3,310</td>
<td>1,256</td>
<td>1,109</td>
<td>1,840</td>
<td>1,470</td>
</tr>
<tr>
<td></td>
<td>100%</td>
<td>58%</td>
<td>22%</td>
<td>20%</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>434</td>
<td>822</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>35%</td>
<td>65%</td>
</tr>
</tbody>
</table>

### VITALITY POINTS OVERVIEW

#### February 2015

- Points Earned: 4,753,295
- Education: 59%
- Prevention: 12%
- Fitness: 16%
- Healthy Living: 9%
- Other: 4%

#### Current Program Year

- Points Earned: 11,340,700
- Education: 48%
- Prevention: 14%
- Fitness: 23%
- Healthy Living: 10%
- Other: 5%

### CONTACT STATISTICS

<table>
<thead>
<tr>
<th></th>
<th>Employee</th>
<th>Spouse</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web Registered</td>
<td>71%</td>
<td>91%</td>
<td>72%</td>
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</tbody>
</table>

### CHILDREN'S ACTIVITIES

<table>
<thead>
<tr>
<th>Program Year to Date</th>
<th>Total Activities</th>
<th>Total Participants</th>
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</thead>
<tbody>
<tr>
<td>Childhood Immunizations</td>
<td>103</td>
<td>103</td>
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<tr>
<td>Kids Health Assessment</td>
<td>269</td>
<td>269</td>
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<tr>
<td>Organized Wellness Activities</td>
<td>42</td>
<td>42</td>
</tr>
<tr>
<td><strong>ALL ACTIVITIES</strong></td>
<td><strong>414</strong></td>
<td><strong>346</strong></td>
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</tbody>
</table>
### CURRENT PROGRAM YEAR ACTIVITY - EMPLOYEES ONLY

<table>
<thead>
<tr>
<th>VITALITY REVIEWS</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Activities</td>
<td>Total Participants</td>
<td>% Engaged</td>
<td></td>
</tr>
<tr>
<td>Vitality Health Review Completions</td>
<td>2,210</td>
<td>2,210</td>
<td>66.8%</td>
<td>57.9%</td>
</tr>
<tr>
<td>Physical Activity Review</td>
<td>588</td>
<td>588</td>
<td>17.8%</td>
<td>14.7%</td>
</tr>
<tr>
<td>Mental Well-being Reviews</td>
<td>2,802</td>
<td>740</td>
<td>22.4%</td>
<td>18.3%</td>
</tr>
<tr>
<td><strong>VITALITY REVIEWS TOTAL</strong></td>
<td>5,600</td>
<td>2,214</td>
<td>66.9%</td>
<td>58.1%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>VITALITY CHECK</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Activities</td>
<td>Total Participants</td>
<td>% Engaged</td>
<td></td>
</tr>
<tr>
<td>Verified Biometric Results</td>
<td>6,912</td>
<td>1,405</td>
<td>42.4%</td>
<td>18.6%</td>
</tr>
<tr>
<td><strong>VITALITY CHECK TOTAL</strong></td>
<td>6,912</td>
<td>1,405</td>
<td>42.4%</td>
<td>18.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EDUCATION</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Course Completions</td>
<td>2,134</td>
<td>649</td>
<td>19.6%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Action Sets and Decision Points</td>
<td>3,340</td>
<td>781</td>
<td>23.6%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Calculators</td>
<td>4,040</td>
<td>1,012</td>
<td>30.6%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Health PTI Webcasts</td>
<td>549</td>
<td>260</td>
<td>7.9%</td>
<td>5.1%</td>
</tr>
<tr>
<td>SmokeFreeTXT</td>
<td>124</td>
<td>30</td>
<td>0.9%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Vitality Squares</td>
<td>2,834</td>
<td>1,652</td>
<td>49.9%</td>
<td>42.5%</td>
</tr>
<tr>
<td>CPR / First Aid Certifications</td>
<td>329</td>
<td>183</td>
<td>5.5%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Update / Confirm Contact Information</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>0.0%</td>
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<tr>
<td><strong>EDUCATION TOTAL</strong></td>
<td>13,350</td>
<td>1,904</td>
<td>57.5%</td>
<td>49.9%</td>
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</table>

<table>
<thead>
<tr>
<th>PHYSICAL ACTIVITY</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verified Workouts</td>
<td>44,711</td>
<td>1,640</td>
<td>49.5%</td>
<td>42.7%</td>
</tr>
<tr>
<td>Verified Workouts - Reasonable Alternative</td>
<td>82</td>
<td>4</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Aerobic Events</td>
<td>1,190</td>
<td>479</td>
<td>14.5%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Sports Leagues</td>
<td>64</td>
<td>36</td>
<td>1.1%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Scheduled Healthy Habit Completions</td>
<td>42,664</td>
<td>985</td>
<td>29.8%</td>
<td>26.7%</td>
</tr>
<tr>
<td><strong>PHYSICAL ACTIVITY TOTAL</strong></td>
<td>88,711</td>
<td>2,018</td>
<td>61.0%</td>
<td>54.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PREVENTION</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flu Shots</td>
<td>11</td>
<td>11</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Mammogram (1)</td>
<td>49</td>
<td>49</td>
<td>3.3%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Pap Smear (1)</td>
<td>87</td>
<td>87</td>
<td>5.9%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Colorectal Screening</td>
<td>27</td>
<td>27</td>
<td>0.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Annual Dental Checkup</td>
<td>557</td>
<td>357</td>
<td>16.8%</td>
<td>4.8%</td>
</tr>
<tr>
<td><strong>PREVENTION TOTAL</strong></td>
<td>731</td>
<td>676</td>
<td>20.4%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EMPLOYER-SPECIFIC</th>
<th>PROGRAM YEAR TO DATE</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer Custom Events</td>
<td>959</td>
<td>270</td>
<td>8.2%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Other Employer-Specific Activities</td>
<td>220</td>
<td>82</td>
<td>2.5%</td>
<td>1.6%</td>
</tr>
<tr>
<td><strong>EMPLOYER-SPECIFIC TOTAL</strong></td>
<td>1,179</td>
<td>344</td>
<td>10.4%</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ALL ACTIVITIES</th>
<th>Prior % Engaged</th>
<th>Current % Engaged</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Activities</td>
<td>116,483</td>
<td>2,730</td>
<td>32.5%</td>
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</tbody>
</table>

### VERIFIED WORKOUTS

<table>
<thead>
<tr>
<th>PROGRAM YEAR TO DATE</th>
<th>FEBRUARY 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light Workouts</td>
<td>Standard Workouts</td>
</tr>
<tr>
<td>Activities</td>
<td>Participants</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------</td>
</tr>
<tr>
<td>Health Club</td>
<td>n/a</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>8</td>
</tr>
<tr>
<td>SmartPhone</td>
<td>17,293</td>
</tr>
<tr>
<td>Other</td>
<td>302</td>
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</table>
## CURRENT PROGRAM YEAR ACTIVITY - EMPLOYEES & SPOUSES

### VITALITY REVIEWS

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vitality Health Review Completions</td>
<td>2,824</td>
<td>2,824</td>
<td>61.8%</td>
</tr>
<tr>
<td>Physical Activity Review</td>
<td>721</td>
<td>721</td>
<td>15.8%</td>
</tr>
<tr>
<td>Mental Well-being Reviews</td>
<td>3,437</td>
<td>904</td>
<td>15.8%</td>
</tr>
<tr>
<td><strong>VITALITY REVIEWS TOTAL</strong></td>
<td>6,982</td>
<td>2,829</td>
<td>62.0%</td>
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</tbody>
</table>

### VITALITY CHECK

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verified Biometric Results</td>
<td>7,802</td>
<td>1,592</td>
<td>34.9%</td>
</tr>
<tr>
<td><strong>VITALITY CHECK TOTAL</strong></td>
<td>7,802</td>
<td>1,592</td>
<td>34.9%</td>
</tr>
</tbody>
</table>

### EDUCATION

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online Course Completions</td>
<td>2,605</td>
<td>804</td>
<td>17.6%</td>
</tr>
<tr>
<td>Action Sets and Decision Points</td>
<td>3,996</td>
<td>932</td>
<td>20.4%</td>
</tr>
<tr>
<td>Calculators</td>
<td>4,941</td>
<td>1,258</td>
<td>27.6%</td>
</tr>
<tr>
<td>Health FYI Webcasts</td>
<td>645</td>
<td>297</td>
<td>6.5%</td>
</tr>
<tr>
<td>SmokeFreeTXT</td>
<td>148</td>
<td>35</td>
<td>0.8%</td>
</tr>
<tr>
<td>Vitality Squares</td>
<td>3,541</td>
<td>2,079</td>
<td>45.5%</td>
</tr>
<tr>
<td>CPR / First Aid Certifications</td>
<td>342</td>
<td>154</td>
<td>4.2%</td>
</tr>
<tr>
<td>Update / Confirm Contact Information</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>EDUCATION TOTAL</strong></td>
<td>16,218</td>
<td>2,391</td>
<td>52.4%</td>
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</table>

### PHYSICAL ACTIVITY

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verified Workouts</td>
<td>56,181</td>
<td>2,022</td>
<td>44.3%</td>
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<tr>
<td>Verified Workouts - Reasonable Alternative</td>
<td>102</td>
<td>6</td>
<td>0.1%</td>
</tr>
<tr>
<td>Athletic Events</td>
<td>1,452</td>
<td>573</td>
<td>12.5%</td>
</tr>
<tr>
<td>Sports Leagues</td>
<td>70</td>
<td>41</td>
<td>0.9%</td>
</tr>
<tr>
<td>Scheduled Healthy Habit Completions</td>
<td>53,329</td>
<td>1,239</td>
<td>27.1%</td>
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<tr>
<td><strong>PHYSICAL ACTIVITY TOTAL</strong></td>
<td>111,134</td>
<td>2,562</td>
<td>56.1%</td>
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### PREVENTION

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flu Shots</td>
<td>19</td>
<td>19</td>
<td>0.4%</td>
</tr>
<tr>
<td>Mammogram (1)</td>
<td>84</td>
<td>84</td>
<td>3.7%</td>
</tr>
<tr>
<td>Pap Smear (1)</td>
<td>118</td>
<td>118</td>
<td>5.1%</td>
</tr>
<tr>
<td>Colorectal Screening</td>
<td>41</td>
<td>41</td>
<td>0.9%</td>
</tr>
<tr>
<td>Annual Dental Checkup</td>
<td>736</td>
<td>736</td>
<td>16.1%</td>
</tr>
<tr>
<td><strong>PREVENTION TOTAL</strong></td>
<td>998</td>
<td>919</td>
<td>20.1%</td>
</tr>
</tbody>
</table>

### EMPLOYER-SPECIFIC

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employer Custom Events</td>
<td>959</td>
<td>270</td>
<td>5.9%</td>
</tr>
<tr>
<td>Other Employer-Specific Activities</td>
<td>251</td>
<td>96</td>
<td>2.1%</td>
</tr>
<tr>
<td><strong>EMPLOYER-SPECIFIC TOTAL</strong></td>
<td>1,210</td>
<td>358</td>
<td>7.8%</td>
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</table>

### ALL ACTIVITIES

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Club</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>10</td>
<td>8</td>
<td>8,745</td>
</tr>
<tr>
<td>Pedometer</td>
<td>21,926</td>
<td>1,270</td>
<td>14,325</td>
</tr>
<tr>
<td>Smartphone</td>
<td>405</td>
<td>122</td>
<td>956</td>
</tr>
<tr>
<td><strong>ALL ACTIVITIES</strong></td>
<td>144,344</td>
<td>3,548</td>
<td>77.7%</td>
</tr>
</tbody>
</table>

(1) Base includes females only  (2) Base includes males only

### VERIFIED WORKOUTS

#### PROGRAM YEAR TO DATE

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light Workouts Activities</td>
<td>n/a</td>
<td>4,254</td>
<td>8,745</td>
</tr>
<tr>
<td>Standard Workouts Activities</td>
<td>1</td>
<td>91</td>
<td>1,002</td>
</tr>
<tr>
<td>Advanced Workouts Activities</td>
<td>11,052</td>
<td>1,162</td>
<td>7,282</td>
</tr>
<tr>
<td>Health Club</td>
<td>10</td>
<td>1</td>
<td>8,745</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>21,926</td>
<td>1,270</td>
<td>14,325</td>
</tr>
<tr>
<td>Pedometer</td>
<td>405</td>
<td>122</td>
<td>956</td>
</tr>
</tbody>
</table>

#### FEBRUARY 2015

<table>
<thead>
<tr>
<th>Program Year To Date</th>
<th>Prior Engaged</th>
<th>Current % Engaged</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Activities</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light Workouts Activities</td>
<td>n/a</td>
<td>n/a</td>
<td>4,254</td>
</tr>
<tr>
<td>Standard Workouts Activities</td>
<td>1</td>
<td>91</td>
<td>1,002</td>
</tr>
<tr>
<td>Advanced Workouts Activities</td>
<td>11,052</td>
<td>1,162</td>
<td>7,282</td>
</tr>
<tr>
<td>Health Club</td>
<td>10</td>
<td>1</td>
<td>8,745</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>21,926</td>
<td>1,270</td>
<td>14,325</td>
</tr>
<tr>
<td>Pedometer</td>
<td>405</td>
<td>122</td>
<td>956</td>
</tr>
</tbody>
</table>

(1) Base includes females only  (2) Base includes males only
ABCD Company
3rd Program Year, 3rd Quarter
1/1/2015 - 3/31/2015

This is a sample report. Results are not based on actual outcomes or results.
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- Evaluation Completions 3
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Unless otherwise indicated, the results shown in this report are from the current program year through the end of the quarter and includes all employees and spouses (where applicable) who were eligible for Vitality as of the last day of the quarter.

---

*This is a sample report. Results are not based on actual outcomes or results.*

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EVALUATION COMPLETIONS

The Vitality Health Review™ (VHR) is an interactive health risk assessment that gathers self-reported information about modifiable health risk factors and develops a profile of the member's unique health risk characteristics. The Vitality Check is an objective biometric screening provided by an independent medical laboratory. The Vitality Check completions show in the display below include members who received a verified measurement for at least one of the following: Body Mass Index, Blood Pressure, Total Cholesterol, and Fasting Glucose.

VHR Completions

36%

2,404 completions

Vitality Check Completions

10%

686 completions

Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total Count</th>
<th>Percent Female</th>
<th>Female Average Age</th>
<th>Male Average Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Population *</td>
<td>2,407</td>
<td>78.0%</td>
<td>46.7</td>
<td>44.7</td>
</tr>
<tr>
<td>ABCD Company Population</td>
<td>6,645</td>
<td>58.2%</td>
<td>49.9</td>
<td>50.1</td>
</tr>
</tbody>
</table>

Statistical Hypothesis Test p-Value

|                          | n/a         | 0.71           | <0.001**           | <0.001**         |

* The Report Population consists of all ABCD Company members who have completed the VHR or received a Vitality Check in the current program year.

** We can conclude that the difference between the demographic characteristics is significantly different if the p-value is less than 0.05. If any of the three p-values is less than 0.05, we conclude that the report population is not a statistically significant representative sample.

In order to determine whether the results shown throughout this report will be representative of ABCD Company's entire Vitality-eligible population, we have performed statistical hypothesis tests on three demographic characteristics: female proportion, female average age, and male average age. If we receive a statistically significant result from all three hypothesis tests, we conclude that the report population is representative. The higher proportion of members who complete the VHR and Vitality Check, the higher the likelihood of obtaining a statistically significant representative population on which we can report risk results.

Based on the demographic characteristics of ABCD Company's report population and comparing those to the same characteristics in the full Vitality-eligible population, we conclude that the report population is not a statistically significant representative population. A higher proportion of members completing evaluations will increase the likelihood of obtaining a representative sample.

This is a sample report. Results are not based on actual outcomes or results.
OVERALL HEALTH AND LIFESTYLE

Vitality assigns an overall relative risk measure of health and lifestyle to each member based on their combined VHR responses and Vitality Check results. The biometric and lifestyle risk factors included in the calculation are: body mass index, blood pressure, total cholesterol, fasting blood glucose, nutrition, physical activity, tobacco use, alcohol consumption, and stress. The overall relative risk measure accounts for both the severity of each risk factor and the interaction among risk factors.

21%
Low Risk: Optimal Overall Health and Lifestyle

62%
At Risk: Borderline Overall Health and Lifestyle

17%
High Risk: Poor Overall Health and Lifestyle

ABCD Company’s Most Prevalent Risk Factors:

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>% with elevated risk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nutrition</td>
<td>59%</td>
</tr>
<tr>
<td>Body Mass Index</td>
<td>55%</td>
</tr>
<tr>
<td>Physical Activity</td>
<td>47%</td>
</tr>
</tbody>
</table>

Perceived Health vs. Actual Health

VHR Participants responded to the following question: How would you describe your overall health over the past 12 months? Below are the results to this questions by overall risk group:

Approximately 71.4% of high risk participants believe their current health is good, very good, or excellent.

This is a sample report. Results are not based on actual outcomes or
Program engagement includes activities focused on driving behavior change and improving an individual's overall health and lifestyle. The activities shown below and throughout the remainder of the report do not include the VHR, Vitality Check, or self-reported Healthy Habits.

**Low Risk (502 Members)**

- **66% completing activities**
  - 145.9 activities

### Activity Distribution

<table>
<thead>
<tr>
<th>Category</th>
<th>Education</th>
<th>Prevention</th>
<th>Fitness</th>
<th>Employer Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent</td>
<td>67%</td>
<td>57%</td>
<td>52%</td>
<td>45%</td>
</tr>
<tr>
<td>Average</td>
<td>14.0</td>
<td>1.6</td>
<td>199.2</td>
<td>5.1</td>
</tr>
</tbody>
</table>

**At Risk (1,498 Members)**

- **62% completing activities**
  - 114.3 activities

### Activity Distribution

<table>
<thead>
<tr>
<th>Category</th>
<th>Education</th>
<th>Prevention</th>
<th>Fitness</th>
<th>Employer Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent</td>
<td>48%</td>
<td>48%</td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>Average</td>
<td>17.3</td>
<td>1.4</td>
<td>129.8</td>
<td>5.9</td>
</tr>
</tbody>
</table>

**High Risk (407 Members)**

- **62% completing activities**
  - 86.9 activities

### Activity Distribution

<table>
<thead>
<tr>
<th>Category</th>
<th>Education</th>
<th>Prevention</th>
<th>Fitness</th>
<th>Employer Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent</td>
<td>54%</td>
<td>31%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>Average</td>
<td>11.0</td>
<td>1.8</td>
<td>104.7</td>
<td>2.5</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
COMPARISON TO VITALITY GROUPS

Demographics & Overall Health and Lifestyle

<table>
<thead>
<tr>
<th></th>
<th>Average Age</th>
<th>% Female/ % Male</th>
<th>Overall Health and Lifestyle Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABCD Company</td>
<td>46.3</td>
<td>78.0% / 22.0%</td>
<td>21% Low Risk / 62% At Risk / 17% High Risk</td>
</tr>
<tr>
<td>Vitality Baseline*</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Vitality population information is not shown in sample reports.*

Participants with Elevated Risk

Biometric Risk Factors

- Body Mass Index (BMI): 55%
- Blood Pressure: 32%
- Cholesterol: 29%
- Fasting Glucose: 10%
- Cotinine: 10%

Lifestyle Risk Factors

- Nutrition: 59%
- Physical Activity: 47%
- Stress: 8%
- Tobacco: 4%
- Alcohol: 4%

This is a sample report. Results are not based on actual outcomes or results.
Quarter-to-quarter changes in the proportion of members with elevated risk for each risk factor occur primarily due to new measurements being added as members complete their VHR and biometric screenings. To a smaller extent, these changes can be attributed to members updating their existing measurements and other members leaving the program. Changes in measurement counts for each risk factor from the prior quarter to the most recent quarter are detailed in the table below:

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Prior Quarter</th>
<th>New (+)</th>
<th>Updated (Δ)</th>
<th>Termed (-)</th>
<th>Current Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Risk</td>
<td>2,051</td>
<td>368</td>
<td>407</td>
<td>12</td>
<td>2,407</td>
</tr>
<tr>
<td>Body Mass Index</td>
<td>1,429</td>
<td>454</td>
<td>232</td>
<td>2</td>
<td>1,881</td>
</tr>
<tr>
<td>Blood Pressure</td>
<td>1,033</td>
<td>140</td>
<td>177</td>
<td>3</td>
<td>1,170</td>
</tr>
<tr>
<td>Cholesterol</td>
<td>571</td>
<td>198</td>
<td>56</td>
<td>1</td>
<td>768</td>
</tr>
<tr>
<td>Fasting Glucose</td>
<td>478</td>
<td>200</td>
<td>48</td>
<td>2</td>
<td>676</td>
</tr>
</tbody>
</table>

79% of members currently have an elevated level of Overall Risk.

-0.3% since last quarter
+4.0% since last year

Body Mass Index
55%
-1.9% since last quarter
+2.4% since last year

Cholesterol
29%
-11.3% since last quarter
-34.4% since last year

Blood Pressure
32%
-0.4% since last quarter
+1.5% since last year

Blood Glucose
10%
+27.7% since last quarter
-37.2% since last year

This is a sample report. Results are not based on actual outcomes or results.
### Point-In-Time Snapshots

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Measurement Counts</th>
<th>Nutrition</th>
<th>Tobacco Use</th>
<th>Physical Activity</th>
<th>Alcohol Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Prior Total</td>
<td>New (+)</td>
<td>Updated (Δ)</td>
<td>Termed (-)</td>
<td>Current Total</td>
</tr>
<tr>
<td>Overall Risk</td>
<td>2,051</td>
<td>368</td>
<td>407</td>
<td>12</td>
<td>2,407</td>
</tr>
<tr>
<td>Poor Nutrition</td>
<td>2,011</td>
<td>380</td>
<td>246</td>
<td>2</td>
<td>2,389</td>
</tr>
<tr>
<td>Physical Inactivity</td>
<td>2,047</td>
<td>351</td>
<td>257</td>
<td>3</td>
<td>2,395</td>
</tr>
<tr>
<td>Stress</td>
<td>2,088</td>
<td>274</td>
<td>254</td>
<td>2</td>
<td>2,360</td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>1,998</td>
<td>411</td>
<td>243</td>
<td>5</td>
<td>2,404</td>
</tr>
<tr>
<td>Alcohol Consumption</td>
<td>2,007</td>
<td>345</td>
<td>260</td>
<td>4</td>
<td>2,348</td>
</tr>
</tbody>
</table>

#### Nutrition
- **59%** of members currently have an elevated level of risk for Nutrition.
- **63%** of members had an elevated level last quarter.
- **59%** of members had an elevated level last year.

#### Tobacco Use
- **4%** of members are currently Tobacco Users.
- **3%** of members were Tobacco Users last quarter.
- **4%** of members were Tobacco Users last year.

#### Physical Activity
- **49%** of members currently have an elevated level of risk for Physical Inactivity.
- **47%** of members were physically inactive last quarter.
- **49%** of members were physically inactive last year.

#### Alcohol Consumption
- **4%** of members currently have an elevated level of risk for Alcohol Consumption.
- **6%** of members were alcohol consumers last quarter.
- **4%** of members were alcohol consumers last year.

#### Stress
- **8%** of members currently have an elevated level of risk for Stress.
- **5%** of members were stressed last quarter.
- **8%** of members were stressed last year.

---

*This is a sample report. Results are not based on actual outcomes or results.*

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BIOMETRICS: BODY MASS INDEX

Vitality population information is not shown in sample reports.

BMI Distribution (n=1,881)

<table>
<thead>
<tr>
<th>Risk Class Description</th>
<th>BMI Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Underweight</td>
<td>Less than 18.5</td>
</tr>
<tr>
<td>Normal</td>
<td>18.5 to less than 25</td>
</tr>
<tr>
<td>Overweight</td>
<td>25 to less than 30</td>
</tr>
<tr>
<td>Obese</td>
<td>30 and above</td>
</tr>
</tbody>
</table>

Verified Distribution (n=548)

<table>
<thead>
<tr>
<th>Risk Class Description</th>
<th>BMI Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Underweight</td>
<td>36%</td>
</tr>
<tr>
<td>Normal</td>
<td>34%</td>
</tr>
<tr>
<td>Overweight</td>
<td>28%</td>
</tr>
<tr>
<td>Obese</td>
<td></td>
</tr>
</tbody>
</table>

Activities

Total Activities

<table>
<thead>
<tr>
<th>Key</th>
<th>% of active members completing activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Completing Activities</td>
</tr>
<tr>
<td></td>
<td>Normal (Low Risk)</td>
</tr>
<tr>
<td></td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>119.0</td>
</tr>
</tbody>
</table>

BMI Related Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculators</td>
<td>26%</td>
<td>1.28</td>
</tr>
<tr>
<td></td>
<td>16%</td>
<td>1.62</td>
</tr>
<tr>
<td></td>
<td>19%</td>
<td>2.10</td>
</tr>
</tbody>
</table>

Goals

<table>
<thead>
<tr>
<th>Goal Type</th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>BMI Related</td>
<td>1,066</td>
<td>473</td>
</tr>
<tr>
<td>Goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unique Goal</td>
<td>493</td>
<td>384</td>
</tr>
<tr>
<td>Participants</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Motivation to Change

Responses of members at elevated risk for BMI:

- 5% I am not happy with my weight but have no intention of losing weight any time soon.
- 15% I am happy with my weight.
- 80% I would like to change my weight and would appreciate help in doing so.

This is a sample report. Results are not based on actual outcomes or results.
BIOMETRICS: CHOLESTEROL

Total Cholesterol Distribution (n=768)

- Low Risk: 71%
- At Risk: 23%
- High Risk: 6%

Verified Distribution (n=449)

- Low Risk: 69%
- At Risk: 22%
- High Risk: 9%

Coronary Heart Disease Risk (CHD) (n=695)

- Low Risk: 81%
- At Risk: 14%
- High Risk: 4%

* Risk levels for Low Density Lipoproteins is dependent on the member's risk of coronary heart disease.

Low Density Lipoproteins (LDL)*

- Low Risk: 80%
- At Risk: 94%
- High Risk: 95%

HDL Cholesterol

- Low Risk: Greater than 40
- High Risk: Less than 40

LDL Cholesterol

- Low Risk for Coronary Heart Disease
  - Low Risk: Less than 160
  - At Risk: 160 - 189
  - High Risk: Greater than 190

- At Risk for Coronary Heart Disease
  - Low Risk: Less than 130
  - At Risk: 130 - 159
  - High Risk: Greater than 160

- High Risk for Coronary Heart Disease
  - Low Risk: Less than 100
  - At Risk: 100 - 129
  - High Risk: Greater than 130

Triglycerides

- Low Risk: Less than 150
- At Risk: 150-199
- High Risk: Greater than 200

Goals

<table>
<thead>
<tr>
<th></th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cholesterol Related Goals</td>
<td>447</td>
<td>155</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>169</td>
<td>100</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
BIOMETRICS: BLOOD PRESSURE

Combined Blood Pressure Distribution
(n=1,170)

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Blood Pressure Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>Systolic &lt;= 120 AND Diastolic &lt;= 80</td>
</tr>
<tr>
<td>At Risk</td>
<td>Systolic 120-139 OR Diastolic 80-89</td>
</tr>
<tr>
<td>High Risk</td>
<td>Systolic &gt; 140 OR Diastolic &gt; 90</td>
</tr>
</tbody>
</table>

Verified Distribution
(n=652)

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>67%</td>
</tr>
<tr>
<td>At Risk</td>
<td>30%</td>
</tr>
<tr>
<td>High Risk</td>
<td>2%</td>
</tr>
</tbody>
</table>

Activities

Total Activities | Blood Pressure Risk Class
--- | --- | --- | ---

<table>
<thead>
<tr>
<th>Key</th>
<th>% of active members completing activities</th>
<th>Low Risk</th>
<th>At Risk</th>
<th>High Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>average activities per active member</td>
<td>201.3</td>
<td>186.3</td>
<td>81.8</td>
</tr>
</tbody>
</table>

Goals

<table>
<thead>
<tr>
<th></th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blood Pressure Related Goals</td>
<td>976</td>
<td>548</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>291</td>
<td>320</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
**BIOMETRICS: DIABETES RISK**

**Fasting Glucose Distribution**  
(n=676)

- **90%** Low Risk  
- **6%** At Risk  
- **3%** High Risk

*Vitality population information is not shown in sample reports.*

**Verified Distribution**  
(n=398)

- **89%** Low Risk  
- **7%** At Risk  
- **4%** High Risk

**Risk Classification**  

<table>
<thead>
<tr>
<th><strong>Fasting Blood Glucose</strong></th>
<th><strong>Value Range</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>0.5.59 mmol/L</td>
</tr>
<tr>
<td>At Risk</td>
<td>5.6-6.9 mmol/L</td>
</tr>
<tr>
<td>High Risk</td>
<td>Greater than 6.9 mmol/L</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>HbA1c</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-diabetic</td>
</tr>
<tr>
<td>Low Risk</td>
</tr>
<tr>
<td>At Risk</td>
</tr>
<tr>
<td>High Risk</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Diabetic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
</tr>
<tr>
<td>At Risk</td>
</tr>
<tr>
<td>High Risk</td>
</tr>
</tbody>
</table>

**Goals**

<table>
<thead>
<tr>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes Related Goals</td>
<td>960</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>133</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
LIFESTYLE: PHYSICAL INACTIVITY

Physical Activity Distribution (n=2,395)

Vitality population information is not shown in sample reports.

<table>
<thead>
<tr>
<th>Risk Classification</th>
<th>Weekly Activity Level/Intensity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>Greater than 150 minutes of moderate/vigorous intensity</td>
</tr>
<tr>
<td>At Risk</td>
<td>60 to 150 minutes of moderate/vigorous intensity</td>
</tr>
<tr>
<td>High Risk - Low Activity</td>
<td>1 to 60 minutes of moderate/vigorous intensity or any low intensity activity</td>
</tr>
<tr>
<td>High Risk - Inactive</td>
<td>0 minutes of any activity</td>
</tr>
</tbody>
</table>

Activities

Total Activities  | Physical Activity Risk Class
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Key:</td>
<td></td>
</tr>
<tr>
<td>average activities per active member</td>
<td>% of active members completing activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physical Activities</th>
<th>Low Risk</th>
<th>At Risk</th>
<th>High Risk I</th>
<th>High Risk II</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Completing Activities</td>
<td>Average Number of Activities</td>
<td>% Completing Activities</td>
<td>Average Number of Activities</td>
</tr>
<tr>
<td>Light Workouts</td>
<td>26%</td>
<td>68.3</td>
<td>35%</td>
<td>79.9</td>
</tr>
<tr>
<td>Standard Workouts</td>
<td>46%</td>
<td>126.0</td>
<td>51%</td>
<td>75.1</td>
</tr>
<tr>
<td>Advanced Workouts</td>
<td>25%</td>
<td>26.5</td>
<td>27%</td>
<td>15.8</td>
</tr>
</tbody>
</table>

Goals

<table>
<thead>
<tr>
<th></th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Activity Related Goals</td>
<td>1,398</td>
<td>1,255</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>992</td>
<td>892</td>
</tr>
</tbody>
</table>

Motivation to Change

Responses of members with elevated risk due to lack of physical activity:

- I know my fitness level needs to improve, but don't really want to exercise more right now. 14%
- I am happy with the amount of exercise I am doing. 14%
- I want to increase my exercise level and feel more energetic. 72%

This is a sample report. Results are not based on actual outcomes or results.
LIFESTYLE: NUTRITION

Nutrition Distribution (n=2,389)

- 41% Low Risk
- 53% At Risk
- 6% High Risk

Vitality population information is not shown in sample reports.

<table>
<thead>
<tr>
<th>Risk Classification</th>
<th>Servings of Fruits &amp; Vegetables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>More than 5 per day</td>
</tr>
<tr>
<td>At Risk</td>
<td>3-5 per day</td>
</tr>
<tr>
<td>High Risk</td>
<td>2 or fewer per day</td>
</tr>
</tbody>
</table>

292 ABCD Company members have registered for Vitality’s HealthyFood rewards program

Activities

<table>
<thead>
<tr>
<th>Total Activities</th>
<th>Nutrition Risk Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key</td>
<td>Low Risk</td>
</tr>
<tr>
<td>% of active members completing activities</td>
<td>62%</td>
</tr>
<tr>
<td>Average activities per active member</td>
<td>180.0</td>
</tr>
</tbody>
</table>

Nutrition Related Activities

<table>
<thead>
<tr>
<th>Nutrition Courses</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>31%</td>
<td>3.2</td>
</tr>
</tbody>
</table>

Goals

<table>
<thead>
<tr>
<th>Nutrition Related Goals</th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>498</td>
<td>643</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unique Goal Participants</th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>379</td>
<td>711</td>
</tr>
</tbody>
</table>

Motivation to Change

Responses of members with elevated risk due to poor nutrition:

- I know my diet needs improvement but don’t really want to change it now. (24%)
- I am happy with my diet. (42%)
- I want to change my diet, and would appreciate some help. (43%)

This is a sample report. Results are not based on actual outcomes or results.

Vitality™

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The Kessler Psychological Distress Assessment is a screening instrument designed to identify anxiety, depression, and other mental disorders in individuals. The assessment consists of ten questions pertaining to negative emotional states experienced in the past four weeks. Each question is answered with one of five responses corresponding to a scale from one to five where a score of one indicates that negative emotional state had been experienced "none of the time" and a score of five indicates that the negative emotional state had been experienced "all of the time". The score for each question is then combined to create a score between 10 and 50 where a higher score is correlated to a higher probability of mental disorder being present.

### Activities

#### Total Activities

<table>
<thead>
<tr>
<th>Key</th>
<th>% of active members completing activities</th>
<th>Stress Risk Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% of active members completing activities</td>
<td>Low Risk 58%</td>
</tr>
</tbody>
</table>

#### Stress Related Activities

<table>
<thead>
<tr>
<th>Stress Related Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculators</td>
<td>18%</td>
<td>2.3</td>
<td>31%</td>
<td>2.3</td>
<td>45%</td>
<td>1.4</td>
</tr>
<tr>
<td>Mental Wellbeing Reviews</td>
<td>25%</td>
<td>3.9</td>
<td>38%</td>
<td>2.8</td>
<td>32%</td>
<td>4.9</td>
</tr>
</tbody>
</table>

### Goals

<table>
<thead>
<tr>
<th></th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stress Related Goals</td>
<td>44</td>
<td>201</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>25</td>
<td>213</td>
</tr>
</tbody>
</table>

**Motivation to Change**

- I feel stressed, but don't feel the need to do anything about my stress levels: 20%
- I feel that I am coping fine with my current level of stress: 10%
- Want to manage my stress better and would appreciate some assistance: 71%

*This is a sample report. Results are not based on actual outcomes or results.*
**LIFESTYLE: ALCOHOL CONSUMPTION**

Alcohol Consumption Distribution  
(n=2,348)  

- **96%**  
  - Low Risk  
- **4%**  
  - High Risk  

*Vitality population information is not shown in sample reports.*

<table>
<thead>
<tr>
<th>Risk Classification</th>
<th>Alcoholic Beverages per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Risk</td>
<td>Less than 8 (female); Less than 15 (male)</td>
</tr>
<tr>
<td>At Risk</td>
<td>8 or more (female); 15 or more (male)</td>
</tr>
</tbody>
</table>

**Activities**

**Total Activities**

<table>
<thead>
<tr>
<th>Legend</th>
<th>Alcohol Consumption Risk Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key</td>
<td>Low Risk</td>
</tr>
<tr>
<td>% of active members completing activities</td>
<td>67%</td>
</tr>
<tr>
<td>Average activities per active member</td>
<td>127.9</td>
</tr>
</tbody>
</table>

**Alcohol Related Activities**

<table>
<thead>
<tr>
<th>Alcohol Related Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculators</td>
<td>8%</td>
<td>1.2</td>
<td>20%</td>
<td>1.1</td>
</tr>
</tbody>
</table>

**Goals**

<table>
<thead>
<tr>
<th></th>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcohol Related Goals</td>
<td>10</td>
<td>83</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>7</td>
<td>82</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual*
LIFESTYLE: TOBACCO USE

Self-Reported Tobacco Use (n=2,404)

- Never: 75%
- Former: 17%
- Current: 4%

Verified Tobacco Use (Cotinine) (n=52)

- Negative: 90%
- Positive: 10%

Vitality population information is not shown in sample reports.

Activities

<table>
<thead>
<tr>
<th>Total Activities</th>
<th>Tobacco Use Risk Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of active members completing activities</td>
<td>Never (Low Risk)</td>
</tr>
<tr>
<td>average activities per active member</td>
<td>71%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tobacco Related Activities</th>
<th>% Completing Activities</th>
<th>Average Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculators</td>
<td>4.1% 2.2</td>
<td>7.9% 1.9</td>
</tr>
<tr>
<td>SmokeFreeTXT</td>
<td>0.1% 1.0</td>
<td>0.7% 0.3</td>
</tr>
</tbody>
</table>

Goals

<table>
<thead>
<tr>
<th>In Progress</th>
<th>Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tobacco Related Goals</td>
<td>26</td>
</tr>
<tr>
<td>Unique Goal Participants</td>
<td>14</td>
</tr>
</tbody>
</table>

Motivation to Change

Responses of members who are current smokers:

- I have no intention of quitting smoking: 36%
- I plan to stop smoking in the future: 62%
- I would like to know how to begin the process of quitting smoking now: 62%

This is a sample report. Results are not based on actual outcomes or results.

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APPENDIX I: VITALITY AGE

Vitality Age is determined upon completion of an assessment and is focused only on modifiable risk factors. It is calculated using an integrated algorithm which is constantly evolving as new evidence emerges from the medical and social sciences.

Ideally a participant's vitality Age is the same as or less than his or her actual age, but this is often not the case. The presence of risk factors such as high cholesterol levels or blood pressure causes Vitality Age to increase. As participants engage in the program, Vitality Age is continually adjusted and updated.

### Vitality Age

**Vitality population information is not shown in sample reports.**

<table>
<thead>
<tr>
<th>Vitality Age Condition</th>
<th>ABCD Company</th>
<th>Baseline</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; Actual Age</td>
<td>12%</td>
<td>78%</td>
</tr>
<tr>
<td>= Actual Age</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>&gt; Actual Age</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Vitality Age Differential

<table>
<thead>
<tr>
<th>Vitality Age Minus Actual Age</th>
<th>Percent of Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;= -5</td>
<td>0%</td>
</tr>
<tr>
<td>-4</td>
<td>2%</td>
</tr>
<tr>
<td>-3</td>
<td>6%</td>
</tr>
<tr>
<td>-2</td>
<td>8%</td>
</tr>
<tr>
<td>-1</td>
<td>9%</td>
</tr>
<tr>
<td>0</td>
<td>9%</td>
</tr>
<tr>
<td>1</td>
<td>11%</td>
</tr>
<tr>
<td>2</td>
<td>11%</td>
</tr>
<tr>
<td>3</td>
<td>11%</td>
</tr>
<tr>
<td>4</td>
<td>10%</td>
</tr>
<tr>
<td>5</td>
<td>9%</td>
</tr>
<tr>
<td>6</td>
<td>7%</td>
</tr>
<tr>
<td>7</td>
<td>5%</td>
</tr>
<tr>
<td>8</td>
<td>3%</td>
</tr>
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<td>9</td>
<td>2%</td>
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<tr>
<td>11</td>
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<td>12</td>
<td>1%</td>
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<td>13</td>
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<tr>
<td>14</td>
<td>0%</td>
</tr>
<tr>
<td>15+</td>
<td>0%</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
## APPENDIX II: ADULT MEMBERS

### Current Program Year Results (Self-reported & Verified measures)

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Average Value</th>
<th>Participants</th>
<th></th>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>Low Risk</td>
<td>At Risk</td>
<td>Low Risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>At Risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Biometric Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>26.7</td>
<td>1,881</td>
<td>847</td>
<td>524</td>
<td>510</td>
</tr>
<tr>
<td></td>
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<tr>
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</tr>
<tr>
<td>Blood Pressure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Blood Pressure</td>
<td>n/a</td>
<td>1,170</td>
<td>790</td>
<td>322</td>
<td>58</td>
</tr>
<tr>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>116.5</td>
<td>1,295</td>
<td>930</td>
<td>323</td>
<td>42</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
<td>72.2</td>
<td>1,292</td>
<td>1,126</td>
<td>144</td>
<td>22</td>
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<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>Cholesterol</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cholesterol Level (mg/dL)</td>
<td>183.7</td>
<td>768</td>
<td>545</td>
<td>180</td>
<td>43</td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>HDL Cholesterol (mg/dL)</td>
<td>62.7</td>
<td>732</td>
<td>667</td>
<td>n/a</td>
<td>65</td>
</tr>
<tr>
<td></td>
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<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>LDL Cholesterol (mg/dL)</td>
<td>106.0</td>
<td>695</td>
<td>654</td>
<td>23</td>
<td>18</td>
</tr>
<tr>
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<tr>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Triglycerides Level (mg/dL)</td>
<td>93.7</td>
<td>695</td>
<td>616</td>
<td>50</td>
<td>29</td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Diabetes Risk</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fasting Glucose (mg/dL)</td>
<td>90.3</td>
<td>676</td>
<td>611</td>
<td>43</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hemoglobin A1c (HbA1c)</td>
<td>5.6</td>
<td>85</td>
<td>56</td>
<td>29</td>
<td>0</td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Lifestyle Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcohol consumption frequency per week</td>
<td>2.8</td>
<td>2,348</td>
<td>2,254</td>
<td>n/a</td>
<td>94</td>
</tr>
<tr>
<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average minutes of physical activity per week</td>
<td>187.6</td>
<td>2,302</td>
<td>1,215</td>
<td>500</td>
<td>587</td>
</tr>
<tr>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily Fruits and Vegetables</td>
<td>4.1</td>
<td>2,389</td>
<td>981</td>
<td>1,270</td>
<td>138</td>
</tr>
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</tr>
<tr>
<td>Kessler Stress Score</td>
<td>13.6</td>
<td>2,360</td>
<td>2,178</td>
<td>151</td>
<td>31</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>n/a</td>
<td>2,404</td>
<td>1,896</td>
<td>418</td>
<td>90</td>
</tr>
<tr>
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</tr>
</tbody>
</table>

### Vitality Check Results (Verified measures)

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Average Value</th>
<th>Participants</th>
<th></th>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>Low Risk</td>
<td>At Risk</td>
<td>Low Risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>At Risk</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>High Risk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Biometric Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>25.7</td>
<td>548</td>
<td>297</td>
<td>109</td>
<td>142</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Blood Pressure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall Blood Pressure</td>
<td>n/a</td>
<td>652</td>
<td>440</td>
<td>196</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>115.5</td>
<td>613</td>
<td>438</td>
<td>159</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
<td>71.6</td>
<td>621</td>
<td>551</td>
<td>57</td>
<td>13</td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>Cholesterol</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cholesterol Level (mg/dL)</td>
<td>187.2</td>
<td>449</td>
<td>311</td>
<td>97</td>
<td>41</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDL Cholesterol (mg/dL)</td>
<td>63.3</td>
<td>439</td>
<td>401</td>
<td>n/a</td>
<td>38</td>
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<td>Blood Glucose</td>
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<tr>
<td>Hemoglobin A1c (HbA1c)</td>
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*This is a sample report. Results are not based on actual outcomes or results.*
## APPENDIX II: ADULT MEMBERS

### Self-Reported Medical Conditions

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<tr>
<th>Medical Condition</th>
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<th>Reported</th>
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<td>Cancer</td>
<td>2,413</td>
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<td>94</td>
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<td>Chronic Pain</td>
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<td>2,279</td>
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<td>Depression</td>
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<td>1,920</td>
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<td>Diabetes</td>
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<td>Heartburn or Acid Reflux</td>
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<td>Heart Disease</td>
<td>2,373</td>
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<td>High Blood Pressure</td>
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<td>Migraine Headaches</td>
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<td>Osteoporosis</td>
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<td>Sleep Disorder</td>
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<td>Stroke</td>
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<td>Thyroid Disease</td>
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*This is a sample report. Results are not based on actual outcomes or results.*
### APPENDIX II: EMPLOYEES

**Vitality Health Review Results (Self-reported measures)**

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<tr>
<th>Risk Factor</th>
<th>Average Value</th>
<th>Participants</th>
<th>Percentage</th>
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<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Total</td>
<td>Low Risk</td>
<td>At Risk</td>
<td>High Risk</td>
<td>Low Risk</td>
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<tr>
<td><strong>Biometric Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>26.6</td>
<td>1,695</td>
<td>776</td>
<td>471</td>
<td>448</td>
<td>46%</td>
</tr>
<tr>
<td>Blood Pressure</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Overall Blood Pressure</td>
<td>n/a</td>
<td>1,085</td>
<td>730</td>
<td>297</td>
<td>58</td>
<td>67%</td>
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<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>116.6</td>
<td>1,152</td>
<td>821</td>
<td>295</td>
<td>36</td>
<td>71%</td>
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<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
<td>72.2</td>
<td>1,148</td>
<td>1,003</td>
<td>123</td>
<td>22</td>
<td>87%</td>
</tr>
<tr>
<td><strong>Cholesterol</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cholesterol Level (mg/dL)</td>
<td>183.7</td>
<td>688</td>
<td>488</td>
<td>163</td>
<td>37</td>
<td>71%</td>
</tr>
<tr>
<td>HDL Cholesterol (mg/dL)</td>
<td>62.9</td>
<td>661</td>
<td>601</td>
<td>n/a</td>
<td>60</td>
<td>91%</td>
</tr>
<tr>
<td>LDL Cholesterol (mg/dL)</td>
<td>106.6</td>
<td>631</td>
<td>596</td>
<td>17</td>
<td>18</td>
<td>94%</td>
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<tr>
<td>Triglycerides Level (mg/dL)</td>
<td>91.2</td>
<td>633</td>
<td>581</td>
<td>34</td>
<td>18</td>
<td>92%</td>
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<tr>
<td><strong>Diabetes Risk</strong></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Fasting Glucose (mg/dL)</td>
<td>90.2</td>
<td>617</td>
<td>552</td>
<td>43</td>
<td>22</td>
<td>89%</td>
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<td>Hemoglobin A1c (HbA1c)</td>
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<td>75</td>
<td>51</td>
<td>24</td>
<td>0</td>
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<td><strong>Lifestyle Risk Factors</strong></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Alcohol consumption frequency per week</td>
<td>2.7</td>
<td>2,125</td>
<td>2,038</td>
<td>n/a</td>
<td>87</td>
<td>96%</td>
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<td>Average minutes of physical activity per week</td>
<td>191.4</td>
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<td>462</td>
<td>602</td>
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<td>Daily Fruits and Vegetables</td>
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<td>13.7</td>
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**Vitality Check Results (Verified measures)**

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<th>Risk Factor</th>
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<th></th>
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<td>Total</td>
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<td>At Risk</td>
<td>High Risk</td>
<td>Low Risk</td>
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<tr>
<td><strong>Biometric Risk Factors</strong></td>
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<tr>
<td>Overall Blood Pressure</td>
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<td>387</td>
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<td>16</td>
<td>65%</td>
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<td>Systolic Blood Pressure (mm Hg)</td>
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<td>494</td>
<td>57</td>
<td>13</td>
<td>88%</td>
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<tr>
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<td>366</td>
<td>n/a</td>
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<td>92%</td>
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<td>LDL Cholesterol (mg/dL)</td>
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<td>93%</td>
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<td>52</td>
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<td>n/a</td>
<td>6</td>
<td>88%</td>
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*This is a sample report. Results are not based on actual outcomes or results.*
## Self-Reported Medical Conditions

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<td>2,013</td>
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<td>1,851</td>
<td>290</td>
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<tr>
<td>Cancer</td>
<td>2,194</td>
<td>2,121</td>
<td>73</td>
</tr>
<tr>
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<tr>
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<td>Heartburn or Acid Reflux</td>
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<td>1,908</td>
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<td>Osteoporosis</td>
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<td>80</td>
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<tr>
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<td>2,188</td>
<td>2,078</td>
<td>110</td>
</tr>
<tr>
<td>Stroke</td>
<td>2,153</td>
<td>2,141</td>
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<tr>
<td>Thyroid Disease</td>
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*This is a sample report. Results are not based on actual outcomes or results.*

©2014 The Vitality Group
## APPENDIX II: SPOUSES

### Vitality Health Review Results (Self-reported measures)

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<tr>
<td>Overall Blood Pressure</td>
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<td>85</td>
<td>60</td>
</tr>
<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>115.9</td>
<td>143</td>
<td>109</td>
</tr>
<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
<td>72.0</td>
<td>144</td>
<td>123</td>
</tr>
<tr>
<td>Cholesterol</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Cholesterol Level (mg/dL)</td>
<td>183.4</td>
<td>80</td>
<td>57</td>
</tr>
<tr>
<td>HDL Cholesterol (mg/dL)</td>
<td>61.0</td>
<td>71</td>
<td>66</td>
</tr>
<tr>
<td>LDL Cholesterol (mg/dL)</td>
<td>100.2</td>
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<td>58</td>
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<td>Triglycerides Level (mg/dL)</td>
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<td>62</td>
<td>35</td>
</tr>
<tr>
<td>Diabetes Risk</td>
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<td></td>
</tr>
<tr>
<td>Fasting Glucose (mg/dL)</td>
<td>90.9</td>
<td>59</td>
<td>59</td>
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<td>Hemoglobin A1c (HbA1c)</td>
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<td>10</td>
<td>5</td>
</tr>
<tr>
<td><strong>Lifestyle Risk Factors</strong></td>
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<td></td>
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<tr>
<td>Alcohol consumption frequency per week</td>
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<td>216</td>
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<td>Average minutes of physical activity per week</td>
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<td>Daily Fruits and Vegetables</td>
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<td>66</td>
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<td>Kessler Stress Score</td>
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<td>205</td>
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<tr>
<td>Tobacco Use</td>
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<td>139</td>
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### Vitality Check Results (Verified measures)

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<th>Average Value</th>
<th>Participants</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Biometric Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>27.2</td>
<td>57</td>
<td>29</td>
</tr>
<tr>
<td>Blood Pressure</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Overall Blood Pressure</td>
<td>n/a</td>
<td>59</td>
<td>53</td>
</tr>
<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>106.8</td>
<td>55</td>
<td>48</td>
</tr>
<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
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<td>57</td>
</tr>
<tr>
<td>Cholesterol</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Cholesterol Level (mg/dL)</td>
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<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>HDL Cholesterol (mg/dL)</td>
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<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>LDL Cholesterol (mg/dL)</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Triglycerides Level (mg/dL)</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Blood Glucose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fasting Glucose (mg/dL)</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Hemoglobin A1c (HbA1c)</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Cotinine Test Result</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
# Self-Reported Medical Conditions

<table>
<thead>
<tr>
<th>Medical Condition</th>
<th>Participants</th>
<th></th>
<th>Reported</th>
<th></th>
<th>Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>None</td>
<td></td>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Allergies</td>
<td>214</td>
<td>169</td>
<td>45</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Arthritis</td>
<td>217</td>
<td>194</td>
<td>23</td>
<td>89%</td>
<td>11%</td>
</tr>
<tr>
<td>Asthma</td>
<td>220</td>
<td>209</td>
<td>11</td>
<td>95%</td>
<td>5%</td>
</tr>
<tr>
<td>Back Pain</td>
<td>215</td>
<td>181</td>
<td>34</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Cancer</td>
<td>219</td>
<td>198</td>
<td>21</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Chronic Lung Disease</td>
<td>213</td>
<td>213</td>
<td>0</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Chronic Pain</td>
<td>212</td>
<td>212</td>
<td>0</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Depression</td>
<td>211</td>
<td>187</td>
<td>24</td>
<td>89%</td>
<td>11%</td>
</tr>
<tr>
<td>Diabetes</td>
<td>216</td>
<td>216</td>
<td>0</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Heartburn or Acid Reflux</td>
<td>215</td>
<td>183</td>
<td>32</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Heart Disease</td>
<td>215</td>
<td>210</td>
<td>5</td>
<td>98%</td>
<td>2%</td>
</tr>
<tr>
<td>High Blood Pressure</td>
<td>223</td>
<td>182</td>
<td>41</td>
<td>82%</td>
<td>18%</td>
</tr>
<tr>
<td>High Cholesterol</td>
<td>215</td>
<td>161</td>
<td>54</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Migraine Headaches</td>
<td>209</td>
<td>197</td>
<td>12</td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Osteoporosis</td>
<td>224</td>
<td>224</td>
<td>0</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Sleep Disorder</td>
<td>217</td>
<td>207</td>
<td>10</td>
<td>95%</td>
<td>5%</td>
</tr>
<tr>
<td>Stroke</td>
<td>218</td>
<td>218</td>
<td>0</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Thyroid Disease</td>
<td>212</td>
<td>206</td>
<td>6</td>
<td>97%</td>
<td>3%</td>
</tr>
</tbody>
</table>
APPENDIX III: BRANCHES

VHR Completion & Percent Elevated Risk

Branches must have at least 50 VHR completions to be displayed.

<table>
<thead>
<tr>
<th>Branch Name</th>
<th>Count</th>
<th>Vitality Age</th>
<th>Actual Age</th>
<th>Difference</th>
<th>Low Risk</th>
<th>At Risk</th>
<th>High Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRANCH A</td>
<td>1,559</td>
<td>50.8</td>
<td>48.0</td>
<td>2.8</td>
<td>20%</td>
<td>66%</td>
<td>14%</td>
</tr>
<tr>
<td>BRANCH B</td>
<td>663</td>
<td>45.0</td>
<td>42.1</td>
<td>3.0</td>
<td>21%</td>
<td>65%</td>
<td>14%</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
APPENDIX III: BRANCHES

Biometric Risk Factors

<table>
<thead>
<tr>
<th>Branch Name</th>
<th>BMI Total</th>
<th>Elevated (53%)</th>
<th>Blood Pressure Total</th>
<th>Elevated (26%)</th>
<th>Cholesterol Total</th>
<th>Elevated (28%)</th>
<th>Fasting Glucose Total</th>
<th>Elevated (8%)</th>
<th>Cotinine Total</th>
<th>Elevated (0%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRANCH A</td>
<td>296</td>
<td>53%</td>
<td>179</td>
<td>26%</td>
<td>166</td>
<td>28%</td>
<td>151</td>
<td>8%</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>BRANCH B</td>
<td>242</td>
<td>54%</td>
<td>156</td>
<td>31%</td>
<td>89</td>
<td>25%</td>
<td>85</td>
<td>0%</td>
<td>16</td>
<td>0%</td>
</tr>
</tbody>
</table>

Lifestyle Risk Factors

<table>
<thead>
<tr>
<th>Branch Name</th>
<th>Nutrition Total</th>
<th>Elevated (58%)</th>
<th>Physical Activity Total</th>
<th>Elevated (40%)</th>
<th>Stress Total</th>
<th>Elevated (6%)</th>
<th>Tobacco Total</th>
<th>Elevated (6%)</th>
<th>Alcohol Total</th>
<th>Elevated (5%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BRANCH A</td>
<td>379</td>
<td>58%</td>
<td>386</td>
<td>40%</td>
<td>352</td>
<td>6%</td>
<td>381</td>
<td>6%</td>
<td>345</td>
<td>5%</td>
</tr>
<tr>
<td>BRANCH B</td>
<td>298</td>
<td>69%</td>
<td>296</td>
<td>66%</td>
<td>276</td>
<td>7%</td>
<td>299</td>
<td>2%</td>
<td>329</td>
<td>2%</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
Agenda

- Executive Summary
- Engagement
- Current Risk Factor Results
- Risk Transitions
Executive Summary
Executive Summary

67% of members completed a Vitality Health Review

64% of members achieved Silver Status or higher

Since starting Vitality, number of members with elevated risk has decreased for 10 risk factors

7.5% net improvement in overall risk groups

*This is a sample report. Results are not based on actual outcomes or results.*
Engagement
Vitality Status Earned This Program Year

Status Distribution

ABC Company - PY 3

Vitality Baseline

Vitality population information is not shown in sample reports.

<table>
<thead>
<tr>
<th>Earned Status</th>
<th>ABC Company Policy Count</th>
<th>ABC Company Distribution</th>
<th>Vitality Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze</td>
<td>1,350</td>
<td>36.0%</td>
<td></td>
</tr>
<tr>
<td>Silver</td>
<td>1,300</td>
<td>34.7%</td>
<td></td>
</tr>
<tr>
<td>Gold</td>
<td>600</td>
<td>16.0%</td>
<td></td>
</tr>
<tr>
<td>Platinum</td>
<td>500</td>
<td>13.3%</td>
<td></td>
</tr>
</tbody>
</table>

64.0% of ABC Company member policies are at Silver status or above

This is a sample report. Results are not based on actual outcomes or results.

Proprietary and confidential: Not for use or disclosure outside The Vitality Group and its clients.
The percentage of employees at Silver status and above has **increased by 97%** since the first program year.

<table>
<thead>
<tr>
<th>Earned Status</th>
<th>PY 1</th>
<th>Distribution</th>
<th>PY 2</th>
<th>Distribution</th>
<th>PY 3</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze</td>
<td>2,500</td>
<td>67.6%</td>
<td>2,000</td>
<td>52.6%</td>
<td>1,350</td>
<td>36.0%</td>
</tr>
<tr>
<td>Silver</td>
<td>675</td>
<td>18.2%</td>
<td>950</td>
<td>25.0%</td>
<td>1,300</td>
<td>34.7%</td>
</tr>
<tr>
<td>Gold</td>
<td>400</td>
<td>10.8%</td>
<td>600</td>
<td>15.8%</td>
<td>600</td>
<td>16.0%</td>
</tr>
<tr>
<td>Platinum</td>
<td>125</td>
<td>3.4%</td>
<td>250</td>
<td>6.6%</td>
<td>500</td>
<td>13.3%</td>
</tr>
<tr>
<td><strong>Silver &amp; above</strong></td>
<td><strong>1,200</strong></td>
<td><strong>32.4%</strong></td>
<td><strong>1,800</strong></td>
<td><strong>47.4%</strong></td>
<td><strong>2,400</strong></td>
<td><strong>64.0%</strong></td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
Evaluations This Program Year

Member Participation

- ABC Company
- Vitality Baseline

VHR: 67.1%
Vitality Check: 48.9%

Vitality population information is not shown in sample reports.

3,020 ABC Company members completed a Vitality Health Review (VHR) and 2,200 members completed a Vitality Check.

This is a sample report. Results are not based on actual outcomes or results.
Evaluations Over Time

Member Participation

- VHR
- Vitality Check

Member Counts:

<table>
<thead>
<tr>
<th></th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>2,550</td>
<td>2,950</td>
<td>3,020</td>
</tr>
<tr>
<td>Vitality Check</td>
<td>1,500</td>
<td>1,950</td>
<td>2,200</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.

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www.thevitalitygroup.com
Monthly Activities

Monthly Activities* per Adult Member

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible members in a given month.

This is a sample report. Results are not based on actual outcomes or results.
Monthly Activities Over Time

Average Monthly Activities* per Adult Member

<table>
<thead>
<tr>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.18</td>
<td>2.68</td>
<td>3.98</td>
</tr>
</tbody>
</table>

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible members in a given month.

This is a sample report. Results are not based on actual outcomes or results.
Verified Workouts

The percentage of ABC Company members that completed a verified workout increased by 24.8% from program year 2 to program year 3.

In program year 3, these members submitted an average of 71.9 verified workouts per active member, an increase of 23.7% from program year 2.

<table>
<thead>
<tr>
<th>Program Year 3</th>
<th>Members</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedometer</td>
<td>990</td>
<td>102,200</td>
</tr>
<tr>
<td>Health Club</td>
<td>410</td>
<td>7,250</td>
</tr>
<tr>
<td>Smartphone</td>
<td>350</td>
<td>3,300</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>60</td>
<td>2,250</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
Since January 1, 2014, ABC Company members have taken 950,000,000 steps and walked approximately 475,000 miles.*

In other words, they have walked to the Moon 2.0 times!
(or circled the Earth 19.1 times)

*Distance was approximated using 2,000 steps per mile.

This is a sample report. Results are not based on actual outcomes or results.
Current Risk Factor Results
Methodology

VHR and VC results for the ABC Company population are displayed on the following slides.

To aid in baseline comparisons, adjusted Vitality database results are also included. These adjusted Vitality database results are derived from a statistical process which allows groups with different demographic structures to be compared. The rationale for this adjustment is as follows:

- Almost all diseases or health outcomes occur at different rates in different age and gender groups.
- Most chronic diseases occur more often among older people.
- Other outcomes, such as certain lifestyle behaviors that can lead to injury, also vary by age and gender.

For this reason, Vitality models the unique demographic characteristics of ABC Company participants on an annual basis which creates a more proper baseline for comparison.
Overall Health and Lifestyle Distribution

The graph below compares the average results from ABC Company to that of the overall Vitality population. All results are based on the most recent measurement for a participant (either VHR or Vitality Check).

ABC Company

Adjusted Vitality Database

Vitality population information is not shown in sample reports.

This is a sample report. Results are not based on actual outcomes or results.
"Top 3" Risk Factors

Out of all risk factors reviewed, the following 3 risk factors have the largest percentage of at risk and high risk members.

<table>
<thead>
<tr>
<th>Nutrition (Fruits &amp; Vegetables)</th>
<th>Body Mass Index</th>
<th>Physical Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>78% of participants consume less than the 5 recommended servings of fruits and vegetables per day.</td>
<td>65% of participants have an increased risk as a result of their body mass index.</td>
<td>54% of participants have an increased risk as a result of their physical activity levels.</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
Nutrition Fruit & Vegetables

Vitality population information is not shown in sample reports.

Poor nutrition is one of the primary unhealthy lifestyle behaviors contributing to hypertension in working age adults.

78.0% of ABC Company participants have an elevated risk of chronic disease due to poor nutrition.

This is a sample report. Results are not based on actual outcomes or results.
Physical Activity

Increasing physical activity is effective in lowering the prevalence of cardiovascular disease, certain cancers, diabetes, and certain mental and nervous disorders.

54.0% of ABC Company participants have an elevated risk of chronic disease due to lack of physical activity.

This is a sample report. Results are not based on actual outcomes or results.
**Body Mass Index**

**Body Mass Index (BMI)**

- Underweight: 1%
- Normal: 35%
- Overweight: 33%
- Obese: 31%

**Vitality population information is not shown in sample reports.**

Eliminating overweight and obesity can lower medical care costs more than any other controllable lifestyle behavior in working age adults.

65.0% of ABC Company participants have an elevated risk of chronic disease due to BMI.

*Results are based on most recent VHR or Vitality Check measurement for a participant.*

**This is a sample report. Results are not based on actual outcomes or results.**
Biometric Risk Factors

Elevated Biometric Risks

- ABC Company
- Adjusted Vitality Database

Vitality population information is not shown in sample reports.

*Results are based on most recent VHR or Vitality Check measurement for a participant.

This is a sample report. Results are not based on actual outcomes or results.
Lifestyle Risk Factors

Elevated Lifestyle Risks

- ABC Company
- Adjusted Vitality Database

Vitality population information is not shown in sample reports.

This is a sample report. Results are not based on actual outcomes or results.
### Detailed Risk Factor Results

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Counts</th>
<th></th>
<th></th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Low Risk</td>
<td>At Risk</td>
<td>High Risk</td>
</tr>
<tr>
<td>Biometric</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index</td>
<td>3,100</td>
<td>1,085</td>
<td>1,035</td>
<td>980</td>
</tr>
<tr>
<td></td>
<td></td>
<td>35.0%</td>
<td>33.4%</td>
<td>31.6%</td>
</tr>
<tr>
<td>Systolic Blood Pressure</td>
<td>2,300</td>
<td>1,449</td>
<td>700</td>
<td>151</td>
</tr>
<tr>
<td></td>
<td></td>
<td>63.0%</td>
<td>30.4%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Diastolic Blood Pressure</td>
<td>2,300</td>
<td>1,656</td>
<td>450</td>
<td>194</td>
</tr>
<tr>
<td></td>
<td></td>
<td>72.0%</td>
<td>19.6%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Total Cholesterol</td>
<td>2,200</td>
<td>1,430</td>
<td>605</td>
<td>165</td>
</tr>
<tr>
<td></td>
<td></td>
<td>65.0%</td>
<td>27.5%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Triglycerides</td>
<td>2,200</td>
<td>1,694</td>
<td>266</td>
<td>240</td>
</tr>
<tr>
<td></td>
<td></td>
<td>77.0%</td>
<td>12.1%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Fasting Glucose</td>
<td>2,150</td>
<td>1,720</td>
<td>320</td>
<td>110</td>
</tr>
<tr>
<td></td>
<td></td>
<td>80.0%</td>
<td>14.9%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Lifestyle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Activity</td>
<td>3,020</td>
<td>1,389</td>
<td>590</td>
<td>1,041</td>
</tr>
<tr>
<td></td>
<td></td>
<td>46.0%</td>
<td>19.5%</td>
<td>34.5%</td>
</tr>
<tr>
<td>Nutrition</td>
<td>3,020</td>
<td>664</td>
<td>1,900</td>
<td>456</td>
</tr>
<tr>
<td></td>
<td></td>
<td>22.0%</td>
<td>62.9%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>3,020</td>
<td>2,100</td>
<td>678</td>
<td>242</td>
</tr>
<tr>
<td></td>
<td></td>
<td>69.5%</td>
<td>22.5%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>3,020</td>
<td>2,839</td>
<td>n/a</td>
<td>181</td>
</tr>
<tr>
<td></td>
<td></td>
<td>94.0%</td>
<td>n/a</td>
<td>6.0%</td>
</tr>
<tr>
<td>Stress</td>
<td>3,020</td>
<td>2,718</td>
<td>210</td>
<td>92</td>
</tr>
<tr>
<td></td>
<td></td>
<td>90.0%</td>
<td>7.0%</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

*Results are based on most recent VHR or Vitality Check measurement for a participant.*

*This is a sample report. Results are not based on actual outcomes or results.*
Healthy People 2020

Healthy People 2020 Comparison

<table>
<thead>
<tr>
<th>Targeted Risk Factors</th>
<th>ABC Company</th>
<th>Healthy People 2008 Baseline</th>
<th>Healthy People 2012 Update</th>
<th>Healthy People 2020 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>BMI &gt; 30</td>
<td>30.6%</td>
<td>33.9%</td>
<td>35.3%</td>
<td>30.5%</td>
</tr>
<tr>
<td>Current Smokers</td>
<td>8.0%</td>
<td>20.6%</td>
<td>18.2%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Total Cholesterol &gt;= 240 mg/dL</td>
<td>7.5%</td>
<td>15.0%</td>
<td>n/a</td>
<td>13.5%</td>
</tr>
<tr>
<td>Physical Inactivity*</td>
<td>54.0%</td>
<td>56.5%</td>
<td>50.0%</td>
<td>52.1%</td>
</tr>
</tbody>
</table>

**"Physical Inactivity" compares the HP 2020 objective for adults who engage in less than "150 minutes/week of moderate intensity or 75 minutes/week of vigorous intensity physical activity, or an equivalent combination" to Vitality members who report less than 150 minutes/week of moderate or vigorous intensity physical activity.**

This is a sample report. Results are not based on actual outcomes or results.
Health-Related Absenteeism

Vitality incorporates questions from the World Health Organization Health and Work Performance Questionnaire (HPQ) into the VHR to measure both health-related absenteeism and job performance.

The following graph shows the average health-related absentee days per member for the 28 day period prior to taking the VHR.

**Health-Related Absences by Health & Lifestyle Risk Group**  
*Employees Only*

<table>
<thead>
<tr>
<th>Category</th>
<th>Days* Absent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optimal (n = 430)</td>
<td>0.50</td>
</tr>
<tr>
<td>Borderline (n = 1,307)</td>
<td>0.75</td>
</tr>
<tr>
<td>Poor (n = 860)</td>
<td>1.15</td>
</tr>
</tbody>
</table>

*Health related-absenteeism data combines full and partial work days missed due to problems with the employee's own physical or mental health. Partial days are estimated as 0.5 work days.*

This is a sample report. Results are not based on actual outcomes or results.
Job Performance Impairment Rates

Even extremely healthy employees cannot perform at 100% capacity all the time. The impairment rates in the graph below show the average reductions in job performance by overall health and lifestyle risk group.

![Impairment by Health & Lifestyle Risk Group](chart)

**Impairment by Health & Lifestyle Risk Group**  
*Employees Only*

- **Optimal** (n = 430): 16.0%
- **Borderline** (n = 1,307): 18.0%
- **Poor** (n = 860): 22.0%

Changes in impairment rates for elevated risk groups:

- **Borderline** 2.0% increase
- **Poor** 6.0% increase

**Methodology:**

1. Job performance ratings were determined using responses to the following HPQ question:  
   *On a scale from 0 to 10 where 0 is the worst job performance anyone could have at your job and 10 is the performance of a top worker, how would you rate your overall job performance on the days you worked during the past 4 weeks (28 days)?*

2. Job performance impairment rates are calculated by \((10 - \text{job performance rating}) / 10\).

3. The healthy impairment rate is set at the optimal health and lifestyle impairment rate.

This is a sample report. Results are not based on actual outcomes or results.
Mental Well-Being Reviews

Compared to other Vitality Groups, ABC Company members are:

in the top 25% for Social Support

in the bottom 25% for Stressors

slightly better than average for Resilience

slightly worse than average for Psychological Well-Being

This is a sample report. Results are not based on actual outcomes or results.
## Mental Well-Being Results

### Detailed Results

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Counts</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Low Risk</td>
</tr>
<tr>
<td>Psychological Well-Being</td>
<td>1,500</td>
<td>890</td>
</tr>
<tr>
<td>Stressors</td>
<td>1,500</td>
<td>550</td>
</tr>
<tr>
<td>Social Support</td>
<td>1,500</td>
<td>1,075</td>
</tr>
<tr>
<td>Resilience</td>
<td>1,500</td>
<td>1,090</td>
</tr>
</tbody>
</table>

### Risk Definitions

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Psychological Well-Being</td>
<td>The overall state of health with low levels of negative emotions and high levels of positive emotions</td>
</tr>
<tr>
<td>Stressors</td>
<td>Major long and short term sources of stress</td>
</tr>
<tr>
<td>Social Support</td>
<td>The physical and emotional comfort and help we get from family, friends, co-workers and others</td>
</tr>
<tr>
<td>Resilience</td>
<td>The ability that ordinary people have to face and recover from life's challenges without being overwhelmed</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
ABC Company parents completed 500 Kid's Health Assessments

60% of kids eat fewer than 5 daily servings of fruits and vegetables

20% of kids frequently get less than an hour of daily physical activity

70% of kids watch more than 2 hours of daily screen time

40% of kids have an elevated risk for BMI

45% of kids don’t get the recommended amount of sleep

This is a sample report. Results are not based on actual outcomes or results.
## Kids Health Results

### Detailed Results

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Counts</th>
<th>Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Low Risk</td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>500</td>
<td>300</td>
</tr>
<tr>
<td>Screen time</td>
<td>500</td>
<td>150</td>
</tr>
<tr>
<td>Physical activity</td>
<td>500</td>
<td>400</td>
</tr>
<tr>
<td>Nutrition</td>
<td>500</td>
<td>200</td>
</tr>
<tr>
<td>Sleep</td>
<td>500</td>
<td>275</td>
</tr>
</tbody>
</table>

### Risk Definitions

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Low Risk</th>
<th>High Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Between the 5th and 85th percentile (by age group)</td>
<td>&lt;= 5th percentile or &gt;= 85th percentile (by age group)</td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>Less than 2 hours per day (combined)</td>
<td>&gt;= 2 hours per day (combined)</td>
</tr>
<tr>
<td>Screen time</td>
<td>&gt;= 60 minutes of moderate to vigorous activity most days of the week</td>
<td>Less than 60 minutes of moderate to vigorous activity most days of the week</td>
</tr>
<tr>
<td>Physical activity</td>
<td>&gt;= 5 servings a day of vegetables and fruit</td>
<td>Less than 5 servings a day of vegetables and fruit</td>
</tr>
<tr>
<td>Nutrition</td>
<td>3 to less than 5 yrs: &gt;= 11 hrs per night</td>
<td>3 to less than 5 yrs: &lt; 11 hrs per night</td>
</tr>
<tr>
<td></td>
<td>5 to less than 10 yrs: &gt;= 10 hrs per night</td>
<td>5 to less than 10 yrs: &lt;10 hrs per night</td>
</tr>
<tr>
<td></td>
<td>10 to less than 18 yrs: &gt;= 8.5 hrs per night</td>
<td>10 to less than 18 yrs: &lt; 8.5 hrs per night</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
Risk Transitions
This analysis uses a consistent base of members within each risk factor. To be included, members must have at least two recorded measurements on file with at least 90 days between the first and last measurements. Last measure recorded in the most recently completed program year. Biometrics include verified measures only.

This is a sample report. Results are not based on actual outcomes or results.
## Individual Risk Transition Results

<table>
<thead>
<tr>
<th>Biometric</th>
<th>Total Members</th>
<th>At/High Risk First Measure</th>
<th>At/High Risk Last Measure</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Body Mass Index</td>
<td>1,800</td>
<td>1,220</td>
<td>1,235</td>
<td>1.2%</td>
</tr>
<tr>
<td>Systolic Blood Pressure</td>
<td>1,725</td>
<td>700</td>
<td>660</td>
<td>-5.7%</td>
</tr>
<tr>
<td>Diastolic Blood Pressure</td>
<td>1,725</td>
<td>484</td>
<td>450</td>
<td>-7.0%</td>
</tr>
<tr>
<td>Total Cholesterol</td>
<td>1,645</td>
<td>640</td>
<td>621</td>
<td>-3.0%</td>
</tr>
<tr>
<td>Triglycerides</td>
<td>1,645</td>
<td>415</td>
<td>406</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Fasting Glucose</td>
<td>1,605</td>
<td>302</td>
<td>317</td>
<td>5.0%</td>
</tr>
<tr>
<td>Cotinine</td>
<td>900</td>
<td>95</td>
<td>84</td>
<td>-11.6%</td>
</tr>
<tr>
<td>Physical Activity&lt;sup&gt;1&lt;/sup&gt;</td>
<td>2,500</td>
<td>1,350</td>
<td>1,025</td>
<td>-24.1%</td>
</tr>
<tr>
<td>Nutrition</td>
<td>2,500</td>
<td>1,950</td>
<td>1,680</td>
<td>-13.8%</td>
</tr>
<tr>
<td>Tobacco Use&lt;sup&gt;2&lt;/sup&gt;</td>
<td>2,500</td>
<td>205</td>
<td>181</td>
<td>-11.7%</td>
</tr>
<tr>
<td>Alcohol&lt;sup&gt;3&lt;/sup&gt;</td>
<td>2,500</td>
<td>160</td>
<td>118</td>
<td>-26.3%</td>
</tr>
<tr>
<td>Stress</td>
<td>2,500</td>
<td>380</td>
<td>325</td>
<td>-14.5%</td>
</tr>
</tbody>
</table>

This analysis uses a consistent base of members within each risk factor. To be included, members must have at least two recorded measurements on file with at least 90 days between the first and last measurements. Last measure recorded in the most recently completed program year. Biometrics include verified measures only.

Please note:
1. This analysis only includes responses received after the 2011 change in VHR physical activity questions.
2. “At/High Risk” for tobacco use reflects members indicating current tobacco use on their VHR in a given program year.
3. The VHR alcohol question changed 1/1/2013; it now asks members to identify the number of alcoholic beverages they consume per week as opposed to the number of alcoholic beverages they consume per day.

*This is a sample report. Results are not based on actual outcomes or results.*
Combined Risk Factor Analysis

Methodology

- Includes the first and last recorded measurement for 10 Risk Factors¹ (defined below)
- Analyzed by the following levels of engagement²:
  - Higher Engagement: average of >= 1 activity per month
  - Lower Engagement: average of < 1 activity per month
- A total of 1,800 members were included

<table>
<thead>
<tr>
<th>Biometric</th>
<th>Lifestyle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Body Mass Index</td>
<td>Physical Activity &lt; 150 minutes</td>
</tr>
<tr>
<td></td>
<td>(moderate to vigorous) or any low</td>
</tr>
<tr>
<td></td>
<td>intensity</td>
</tr>
<tr>
<td>Systolic Blood</td>
<td>Tobacco Use</td>
</tr>
<tr>
<td>Pressure</td>
<td>Current smoker</td>
</tr>
<tr>
<td>Diastolic Blood</td>
<td>Nutrition</td>
</tr>
<tr>
<td>Pressure</td>
<td>(Fruits &amp; Vegetables)</td>
</tr>
<tr>
<td></td>
<td>&lt; 5 servings/day</td>
</tr>
<tr>
<td>Total Cholesterol</td>
<td>Alcohol³</td>
</tr>
<tr>
<td>&gt;= 200 mg/dL</td>
<td>&gt; 7 units/week (female) or</td>
</tr>
<tr>
<td></td>
<td>&gt; 14 units/week (male)</td>
</tr>
<tr>
<td>Fasting Glucose</td>
<td>Stress</td>
</tr>
<tr>
<td>&gt;= 100 mg/dL</td>
<td>Elevated stress</td>
</tr>
</tbody>
</table>

¹ A member must have at least two known measurements for all 10 risk factors to be included in this analysis; there must be at least 90 days between the first and last recorded measurement for all included risk factors. Biometrics include verified measures only.
² Average monthly engagement includes all months since the member became eligible on the Vitality program. Activity counts exclude VHRs, Vitality Checks, and Healthy Habits.
³ The VHR alcohol question changed 1/1/2013; it now asks members to identify the number of alcoholic beverages they consume per week as opposed to the number of alcoholic beverages they consume per day

This is a sample report. Results are not based on actual outcomes or results.
Combined Risk Factor Analysis

Reduction in Risk Factors
(n = 1,800)

<table>
<thead>
<tr>
<th></th>
<th>First Measure</th>
<th>Last Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-2</td>
<td>23%</td>
<td>43%</td>
</tr>
<tr>
<td>3-4</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>5+</td>
<td>42%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Expected natural migration is equal to a 1% deterioration in risk groups\(^1\).

As demonstrated above, there was a net improvement of 7.5% in risk groups.

---


\(\text{This is a sample report. Results are not based on actual outcomes or results.}\)
Combined Risk Factor Analysis by Engagement

Higher Engagement

Reduction in Risk Factors: Higher Engagement
(n = 1,113)

- First Measure:
  - 0-2: 27%
  - 3-4: 35%
  - 5+: 32%

- Last Measure:
  - 0-2: 40%
  - 3-4: 37%
  - 5+: 28%

Lower Engagement

Reduction in Risk Factors: Lower Engagement
(n = 687)

- First Measure:
  - 0-2: 15%
  - 3-4: 48%
  - 5+: 37%

- Last Measure:
  - 0-2: 14%
  - 3-4: 51%
  - 5+: 35%

Net improvement of 11.5% in risk groups.

Net improvement of 1.0% in risk groups.

Members with high wellness engagement had a greater net improvement in risk groups than members with low wellness engagement.

*This is a sample report. Results are not based on actual outcomes or results.*
## Combined Risk Factor Analysis Results

<table>
<thead>
<tr>
<th>Biometric</th>
<th>Total Members</th>
<th>At/High Risk First Measure</th>
<th>At/High Risk Last Measure</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Body Mass Index</td>
<td>1,600</td>
<td>1,115</td>
<td>1,134</td>
<td>1.7%</td>
</tr>
<tr>
<td>Systolic Blood Pressure</td>
<td>1,600</td>
<td>650</td>
<td>610</td>
<td>-6.2%</td>
</tr>
<tr>
<td>Diastolic Blood Pressure</td>
<td>1,600</td>
<td>450</td>
<td>415</td>
<td>-7.8%</td>
</tr>
<tr>
<td>Total Cholesterol</td>
<td>1,600</td>
<td>625</td>
<td>612</td>
<td>-2.1%</td>
</tr>
<tr>
<td>Fasting Glucose</td>
<td>1,600</td>
<td>300</td>
<td>315</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lifestyle</th>
<th>Total Members</th>
<th>At/High Risk First Measure</th>
<th>At/High Risk Last Measure</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Activity</td>
<td>1,600</td>
<td>1,050</td>
<td>775</td>
<td>-26.2%</td>
</tr>
<tr>
<td>Nutrition</td>
<td>1,600</td>
<td>1,300</td>
<td>1,120</td>
<td>-13.8%</td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>1,600</td>
<td>125</td>
<td>109</td>
<td>-12.8%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>1,600</td>
<td>120</td>
<td>85</td>
<td>-29.2%</td>
</tr>
<tr>
<td>Stress</td>
<td>1,600</td>
<td>200</td>
<td>165</td>
<td>-17.5%</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
Appendices
Evaluations This Program Year – Employees Only

Employee Participation

- ABC Company
- Vitality Baseline

<table>
<thead>
<tr>
<th>Service</th>
<th>ABC Company</th>
<th>Vitality Baseline</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>69.3%</td>
<td></td>
</tr>
<tr>
<td>Vitality Check</td>
<td>50.7%</td>
<td></td>
</tr>
</tbody>
</table>

2,600 ABC Company employees completed a Vitality Health Review (VHR) and 1,900 employees completed a Vitality Check.

This is a sample report. Results are not based on actual outcomes or results.
Evaluations Over Time – Employees Only

Employee Participation

- VHR
- Vitality Check

<table>
<thead>
<tr>
<th>Percentage of Employees</th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>60.8%</td>
<td>65.8%</td>
<td>69.3%</td>
</tr>
<tr>
<td>Vitality Check</td>
<td>35.1%</td>
<td>44.7%</td>
<td>50.7%</td>
</tr>
</tbody>
</table>

Employee Counts:

<table>
<thead>
<tr>
<th></th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>2,250</td>
<td>2,500</td>
<td>2,600</td>
</tr>
<tr>
<td>Vitality Check</td>
<td>1,300</td>
<td>1,700</td>
<td>1,900</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
Evaluations This Program Year – Spouses Only

Spouse Participation

- ABC Company
- Vitality Baseline

VHR
- 56.0%

Vitality Check
- 40.0%

420 ABC Company spouses completed a Vitality Health Review (VHR) and 300 spouses completed a Vitality Check.

This is a sample report. Results are not based on actual outcomes or results.
Evaluations Over Time – Spouses Only

Spouse Participation

<table>
<thead>
<tr>
<th></th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>33.3%</td>
<td>52.9%</td>
<td>56.0%</td>
</tr>
<tr>
<td>Vitality Check</td>
<td>22.2%</td>
<td>29.4%</td>
<td>40.0%</td>
</tr>
</tbody>
</table>

Spouse Counts:

<table>
<thead>
<tr>
<th></th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>VHR</td>
<td>300</td>
<td>450</td>
<td>420</td>
</tr>
<tr>
<td>Vitality Check</td>
<td>200</td>
<td>250</td>
<td>300</td>
</tr>
</tbody>
</table>

This is a sample report. Results are not based on actual outcomes or results.
**Monthly Activities – Employees Only**

**Monthly Activities* per Employee**

<table>
<thead>
<tr>
<th>Month</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>4.02</td>
<td>4.02</td>
</tr>
<tr>
<td>February</td>
<td>4.20</td>
<td>4.20</td>
</tr>
<tr>
<td>March</td>
<td>4.26</td>
<td>4.26</td>
</tr>
<tr>
<td>April</td>
<td>4.42</td>
<td>4.42</td>
</tr>
<tr>
<td>May</td>
<td>4.49</td>
<td>4.49</td>
</tr>
<tr>
<td>June</td>
<td>4.62</td>
<td>4.62</td>
</tr>
<tr>
<td>July</td>
<td>4.92</td>
<td>4.92</td>
</tr>
<tr>
<td>August</td>
<td>4.98</td>
<td>4.98</td>
</tr>
<tr>
<td>September</td>
<td>5.22</td>
<td>5.22</td>
</tr>
<tr>
<td>October</td>
<td>5.34</td>
<td>5.34</td>
</tr>
<tr>
<td>November</td>
<td>5.40</td>
<td>5.40</td>
</tr>
<tr>
<td>December</td>
<td>5.40</td>
<td>5.40</td>
</tr>
</tbody>
</table>

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible employees in a given month.

This is a sample report. Results are not based on actual outcomes or results.
Monthly Activities Over Time – Employees Only

Average Monthly Activities* per Employee

<table>
<thead>
<tr>
<th></th>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-12</td>
<td>1.41</td>
<td>3.21</td>
<td>4.77</td>
</tr>
</tbody>
</table>

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible employees in a given month.

This is a sample report. Results are not based on actual outcomes or results.
Monthly Activities – Spouses Only

Monthly Activities* per Spouse

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible spouses in a given month.

This is a sample report. Results are not based on actual outcomes or results.
**Monthly Activities Over Time – Spouses Only**

### Monthly Activities* per Spouse

<table>
<thead>
<tr>
<th>Jan-12</th>
<th>Mar-12</th>
<th>May-12</th>
<th>Jul-12</th>
<th>Sep-12</th>
<th>Nov-12</th>
<th>Jan-13</th>
<th>Mar-13</th>
<th>May-13</th>
<th>Jul-13</th>
<th>Sep-13</th>
<th>Nov-13</th>
<th>Jan-14</th>
<th>Mar-14</th>
<th>May-14</th>
<th>Jul-14</th>
<th>Sep-14</th>
<th>Nov-14</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.50</td>
<td>0.50</td>
<td>0.50</td>
<td>0.50</td>
<td>0.50</td>
<td>1.00</td>
<td>1.50</td>
<td>2.00</td>
<td>2.50</td>
<td>3.00</td>
<td>3.50</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
<td>4.00</td>
</tr>
</tbody>
</table>

### Average Monthly Activities* per Spouse

<table>
<thead>
<tr>
<th>PY 1</th>
<th>PY 2</th>
<th>PY 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.94</td>
<td>2.14</td>
<td>3.18</td>
</tr>
</tbody>
</table>

*Monthly activities exclude all VHR, Vitality Check screenings, and self-reported Healthy Habits. Average monthly activity counts calculated by taking total monthly activity counts divided by Vitality-eligible spouses in a given month.

**This is a sample report. Results are not based on actual outcomes or results.**
Verified Workouts – Employees Only

37.3% of ABC Company employees completed a verified workout this program year.

These employees submitted an average of 71.4 verified workouts per active employee.

<table>
<thead>
<tr>
<th>Program Year 3</th>
<th>Employees</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedometer</td>
<td>850</td>
<td>90,700</td>
</tr>
<tr>
<td>Health Club</td>
<td>350</td>
<td>6,000</td>
</tr>
<tr>
<td>Smartphone</td>
<td>300</td>
<td>1,300</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>50</td>
<td>2,000</td>
</tr>
</tbody>
</table>

Verified Workouts:
- Unique Participants
  - PY 1: 27.0%
  - PY 2: 31.6%
  - PY 3: 37.3%

Verified Workouts:
- Workouts per Participating Employee
  - PY 1: 45.0
  - PY 2: 58.3
  - PY 3: 71.4

This is a sample report. Results are not based on actual outcomes or results.
Verified Workouts – Spouses Only

26.7% of ABC Company spouses completed a verified workout this program year.

These spouses submitted an average of 75.0 verified workouts per active spouse.

<table>
<thead>
<tr>
<th>Program Year 3</th>
<th>Spouses</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pedometer</td>
<td>140</td>
<td>11,500</td>
</tr>
<tr>
<td>Health Club</td>
<td>60</td>
<td>1,250</td>
</tr>
<tr>
<td>Smartphone</td>
<td>50</td>
<td>2,000</td>
</tr>
<tr>
<td>Heart Rate Monitor</td>
<td>10</td>
<td>250</td>
</tr>
</tbody>
</table>

*This is a sample report. Results are not based on actual outcomes or results.*
## Risk Factor Definitions

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Low Risk</th>
<th>At Risk</th>
<th>High Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Biometric Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body Mass Index (BMI)</td>
<td>18.5 to 24.9</td>
<td>25 to 29.9</td>
<td>Less than 18.5 or 30 or higher</td>
</tr>
<tr>
<td>Systolic Blood Pressure (mm Hg)</td>
<td>Less than 121</td>
<td>121 to 139</td>
<td>140 or higher</td>
</tr>
<tr>
<td>Diastolic Blood Pressure (mm Hg)</td>
<td>Less than 81</td>
<td>81 to 89</td>
<td>90 or higher</td>
</tr>
<tr>
<td>Total Cholesterol (mg/dL)</td>
<td>Less than 200</td>
<td>200 to 239</td>
<td>240 or higher</td>
</tr>
<tr>
<td>Fasting Glucose (mg/dL)</td>
<td>Less than 100</td>
<td>100 to 124</td>
<td>125 or higher</td>
</tr>
<tr>
<td>Triglycerides (mg/dL)</td>
<td>Less than 151</td>
<td>151 to 204</td>
<td>205 or higher</td>
</tr>
<tr>
<td><strong>Lifestyle Risk Factors</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alcohol consumption (frequency per week)</td>
<td>Females: 7 or fewer</td>
<td>Males: 14 or fewer</td>
<td>n/a</td>
</tr>
<tr>
<td>Physical Activity (average minutes per week)</td>
<td>150 minutes or higher (moderate to vigorous intensity)</td>
<td>60 to 150 minutes (moderate to vigorous intensity)</td>
<td>0 to 60 minutes (moderate to vigorous intensity) or any low intensity</td>
</tr>
<tr>
<td>Fruits and vegetables (daily servings)</td>
<td>5 or more</td>
<td>2 to 4</td>
<td>0 to 1</td>
</tr>
<tr>
<td>Stress (Kessler score)</td>
<td>Less than 20</td>
<td>20 to 29</td>
<td>30 or higher</td>
</tr>
<tr>
<td>Tobacco Use</td>
<td>Never</td>
<td>Previously</td>
<td>Currently</td>
</tr>
</tbody>
</table>
Thank You.