



Inspiring Vitality Presents this confidential, proprietary

Employee-Client-Family Wellness Proposal for ComForCare, LLC

Not to be shared outside the ComForCare, LLC Leadership Team

April 19, 2019

Overview and Objectives

Expanding ComForCare's business strategy to include a visible, content-rich, and generation-spanning wellness program is a natural fit for your core brand mission of "At ComForCare, our greatest passion is inspiring our clients and caregivers to live their best lives possible." This statement highlights ComForCare as a heart-centered provider, a preferred employer, and an intuitive champion of the powerful synergy of a combined strategy of addressing the well-being of the caregiver and clients and their families.

A wellness component for your *clients* is a powerful value-add to your service model and marketing messages. An *employee* wellness initiative benefits not only the employees themselves but the company by decreasing absenteeism, and increasing loyalty. A wellness model that addresses clients and employees *together* capitalizes on the natural, reciprocal affection that develops between client and caregiver. It is also a value-add for the client for their time spent together and a value-add for the caregiver who is, in essence, being encouraged to work on their own wellness while they are at work to model for their clients. Including *families* in the target audience provides yet another value-add. Because the home care business model includes significant interaction with families in addition to the clients themselves, ComForCare is uniquely positioned to serve as a natural facilitator of education and inspiration for generational relationships and wellness throughout life stages. Because of their exposure to the ailments of older adults, caregivers and family members are uniquely positioned to be receptive to messaging points that their habits today will influence their future wellness.

Inspiring Vitality's "Wellness Model" fits with your goal of providing a wellness model that is effective yet un-complicated. Our "plug-and-play" approach will delight your business owners and caregivers with lifestyle strategies with two tracks for dual-age focus, in three umbrella areas, with four levels for different abilities and interest levels.

Inspiring Vitality's Certification Distinction allows ComForCare to attach a prestige marketing advantage and at the same time provide a gatekeeping mechanism for implementation among business owners.

Inspiring Vitality is uniquely positioned to be a preferred partner in achieving ComForCare’s objectives as the only wellness provider with specialized expertise and credentials in wellness for both the working population and the older adult population, and a proprietary wellness model that addresses both populations together. *Inspiring Vitality* is committed to excellence in program quality, business practices, and customer service.

Inspiring Vitality’s Wellness Model

Inspiring Vitality’s wellness model is based on lifestyle habits that impact a Strong Body, Sharp Brain, and Endless Energy at the same time. We also utilize tracks for “Never Too Early” and “Never Too Late” and include a foundational four-level fitness platform.

Lifestyle habits that impact overlapping wellness areas.

It is possible to gain meaningful wellness benefits with modest lifestyle change. The *Inspiring Vitality* Model recommends non-overwhelming, do-able lifestyle habits that deliver meaningful benefits in multiple, overlapping wellness areas that can be modified for all stages of life and interest level. Wellness-seekers are often overwhelmed with separate, conflicting or unrealistic recommendations for each of the areas of wellness they desire to improve. *Inspiring Vitality* cuts through the confusion with one unified set of sensible, pleasantly-delivered recommendations that address a comprehensive view of wellness. Programming and materials are available for more in-depth recommendations for the following non-inclusive list of wellness habits.

Example Wellness Areas that Creates a Strong Body, Sharp Brain, and Endless Energy

- Master our mindset
- Cardiovascular exercise
- Strength training exercise
- Move more during the day
- Don’t smoke
- Eat more of the superfoods and less processed foods
- Maintain a healthy weight
- Resist fad diet
- Drink lots of water
- Get enough sleep
- Manage stress
- Maintain an active social life and/or family life with meaningful relationships
- Have purposeful pursuits
- Always keep learning
- Protect your healthy hearing
- Include change, surprise, and zest in daily life

Educational modules and the resource library will contain information on each area.

Three Over-Arching Focus Areas that Encompass Overall Wellness

Whole-person wellness includes many areas of life and health needs. The *Inspiring Vitality* Model identifies three umbrella focus areas that encompass numerous wellness sub-areas: a strong body, sharp brain, and endless energy. This model highlights the tremendous overlap in the one list that benefits all three areas and provides a simplified, memorable framework.

Specialized applications exist for the never too early and never too late tracks.

- **Strong Body** includes areas such as fitness, nutrition, weight loss, cholesterol, blood pressure, mobility, and falls prevention.
- **Sharp Brain** includes areas such as brain fitness, processing speed and mental clarity, memory enhancement, dementia risk reduction and symptom management, healthy hearing, vocational wellness/purposeful pursuits, intellectual wellness/mental stimulation, and social interaction.
- **Endless Energy** includes areas such as healthy sleep habits, fatigue management, stress management, and emotional wellness.

Two Tracks: It's Never TOO EARLY or TOO LATE to Improve Your Wellness

It's never too early and it's never too late to make small changes that will yield meaningful results in your overall health, wellness, and quality of life. The Never Too Early, Never Too Late model includes:

The Never Too Early Track is generally focused on prevention and the opportunity for working-age adults to build good habits early in life to maximize their current wellness and also to prevent health issues later. The question/answer of: *"What type of 85-year-old do you want to be? Because you're working on it right now."* is *Inspiring Vitality's* signature self-reflection prompt for the Never Too Early track. Fitness recommendations are more rigorous for the Never Too Early Track, appropriate for a higher physical capacity, regardless of age.

The Never Too Late Track focuses on the motivating message that the human body and brain can respond to lifestyle change efforts even at advanced age. Strategies are provided for older adults to positively impact their wellness, mobility, and quality of life regardless of their current physical and/or cognitive challenges.

Foundational FOUR-Level Fitness Platform

Inspiring Vitality operates with a foundational four-level fitness platform that includes tracks for Never Too Early and Never Too Late. We place a high priority on physical exercise with the appropriate level and content for each individual for two important reasons: 1. Exercise is the closest thing we have to a magic pill, delivering more benefits in more areas of wellness than any other single action we can take. 2. Maintaining or improving physical mobility enhances an individual's ability to participate in and enjoy everything else life has to offer.

The Four Levels Include Never Too Early and Never Too Late Tracks for:

- Level One: Just MOVE!
- Level Two: 20-minute No Equipment Exercise Plan
- Level Three: 40-minute Minimal Equipment Exercise Plan
- Level Four: 60+-minute Full-Fledged Exercise Plan

Each level includes appropriate fitness assessments that can be administered by caregivers as well as instructions for home exercise routines that can be done alone or with caregivers and clients together. Video tutorials will be located in the resource library.

Sample Program Components Available

Based on the package you choose, the following are sample program components:

- Owner training and certification (depth TBD)
- Caregiver training and certification (depth TBD)
- *Inspiring Vitality* “Wellness-In-A-Box” Kit that can be provided to each caregiver or client: includes congratulatory certificate for *Inspiring Vitality* in each other. A copy of the “Strong Body, Sharp Brain, Endless Energy” book, the companion workbook, wellness assessment instructions and forms, exercise bands and tubing, Inspiring Vitality wellness-themed playing cards and/or flash cards, checklists, goal sheets, other items to be determined.
- Online Resource Library
- Monthly educational webinar, electronic newsletter, video tips
- Champion team
- Quarterly Participation Reach Tally and Celebration Video messages profiling business owners or client/caregiver/families with their story of “*How I’m Inspiring Vitality!*”
- Specialty 4-week wellness challenges or online classes
- Group wellness coaching
- One-on-one wellness coaching
- “Owners’ only” monthly Zoom strategy session (can be offered at multiple times)
- *Inspiring Vitality* Champion Team
- Inter-Generational Wellness Discussion Series and “Being Mortal” book study
- Inspiring Vitality On-going Support System
- Program evaluation measures and annual reporting

Certification Distinction

The scope and delivery method of the certification can be determined based on needs and realistic expectations for training time. The certification distinction is necessary to not only create a prestige marketing advantage but to provide a gatekeeping mechanism for implementation among business owners.

Wellness-in-a-Box Kit

The Wellness-in-a-Box Kit is a key program component because it is a physical, tangible item that caregivers, clients, and families can all utilize in the home setting. The decentralized, hands-on nature of the business depends on time spent together, in-person, therefore it is important that our wellness delivery methods leverage the face-time clients and caregivers have together. In addition, older adults often prefer hard-copy materials over electronic materials.

Inter-Generational Wellness Discussion Series

A unique offering of Inspiring Vitality is a book study group for “Being Mortal” along with a facilitated inter-generational discussion group, primarily for family members. This important opportunity teaches family members how to have proactive conversations with their loved ones to plan for medical and lifestyle decisions that may need to be made in the future should the loved one not be able to make these decisions for themselves.

Inspiring Vitality Champion Team

We will reward and leverage team members who are enthusiastic about personal wellness and are interested in encouraging others to participate by inviting them to be part of a Champion Team. The purpose of membership on the team will be to help promote the Inspiring Vitality Program to their co-workers and encourage participation. They’ll receive t-shirts, other gifts, and special offers.

Sample Implementation Timeline

In consideration of a launch date of Nov. 15-16, with several business owners piloting the program prior to that date, the following tentative timeline is recommended:

- April 23-29, 2019: Contract finalized
- April 29-May 31: Needs/interest survey to select business owners and informational interviews with select employees, clients, and family members and results compiled for customization of program components.
- June 1-July 15: Development of program components, including
 - Business Owner Training/Certification materials
 - Caregiver Training/Certification Materials
 - Program brochure
 - Wellness-in-a-box kit
 - Web link with welcome video and start of resource library/tool-kit
 - Webinar training overview for owners and caregivers (live or recorded)
 - Introduction communication materials for clients and families
- July 15-25: Leadership input on components
- August 12-Oct 11: Pilot period at pilot sites. Collect video footage and testimonials
- Oct. 14-Nov. 8 Create promotional video for conference. Summarize recommendations for full roll-out and prepare for Nov. 15-16 presentation
- November 15-16: Launch for all partners

Contract Model

Once the proposal components are finalized, a one-year contract will be signed. The contract automatically renews on the one-year anniversary unless canceled 30 days prior to renewal date. Initial strategic set up fee is due at time of contract signing. Additional fees will be due at time incurred. Once program components are available for use, payment will commence to the monthly fee per eligible user, per month. A user is defined as an employee or a client. Family members of the client will have free access as ComForCare's gift to them for choosing ComForCare for their loved one.

Overall Investment Model		
Item	Description	Fee Structure
Strategic Set Up Fee	Intellectual property for strategy and Implementation Plan, Initial development/customization of materials	Annual Set Up Fee (Based on Option Selected)
Pilot Period Fees	During the May-October 2019 period, the focus will be on development and usage by only two pilot sites.	Flat Monthly Fee.
Inspiring Vitality Monthly Usage Fee	Ongoing Program Administration, Communication , Implementation, Reporting	Monthly Fee Per total eligible employees and clients per month (Based on Option selected)
Travel	Transportation and lodging for in-person events	TBD; may be included in other fee categories
Outside of Defined Scope	Work requested outside the scope of our agreement	As negotiated
Materials	At your discretion for hard copy newsletters, wellness in a box components, promotional items such as t-shirts and other logo-items	TBD; some items may be included in other fee categories.

Definition of Eligible User

The primary target audience is employees and clients, making eligible users the total number of employees plus the total number of clients each month. Families are an additional target market, however, their usage will be included for no extra fee. The definition of and any limitation of family members is subject to discussion. (For instance, usage may be limited to two family members.)

Assumptions for Eligible Users: For the purposes of this proposal, we have estimated 16,000 eligible users. A tiered fee structure is available based on eligible users.

Investment Proposal		
Strategic Set Up	<ul style="list-style-type: none"> ○ Sharing of intellectual property for strategy and implementation plan ○ Needs and interest assessment ○ Initial development and customization of materials with leadership guidance 	Annual Set Up Fee \$12,000
Pilot Period	<ul style="list-style-type: none"> ○ Continued development period and coordination with two pilot sites 	\$5,000/month for six months
Level	Program Components Available to All Users	Monthly Investment*
Basic Program	<ul style="list-style-type: none"> ○ Inspiring Vitality’s “Strong Body, Sharp Brain, Endless Energy: Never Too Early, Never Too Late” Content, delivered via: <ul style="list-style-type: none"> ○ Online Owner Training and certification ○ Online Caregiver Training and certification ○ Wellness assessment – quality of life measures, lifestyle habits and home fitness testing ○ Wellness-in-a-box includes items such as: <ul style="list-style-type: none"> ▪ Congratulatory certificate for <i>Inspiring Vitality</i> in each other ▪ A copy of the “Strong Body, Sharp Brain, Endless Energy” book ▪ Strong Body, Sharp Brain, Endless Energy Workbook ▪ Goal forms and checklists ▪ Wellness assessment instructions and forms ▪ Exercise bands and/or tubing ▪ Inspiring Vitality wellness-themed playing cards and/or flash cards ▪ Other items to be determined ○ Monthly Video Wellness Tips and Electronic Newsletter ○ Resource Library accessible by employees and clients/families ○ Monthly Check-in call with management representative ○ 25% discount off retail rates for additional copies of Strong Body, Sharp Brain, Endless Energy ○ Annual reporting 	\$1.50 per user per month

Standard Program	<p>All of the Above Plus</p> <ul style="list-style-type: none"> ○ Goal forms and checklists will include instructions for submitting goal achievement. ○ Goal forms will be compiled leading to TBD celebratory recognition ○ Quarterly Participation Reach Tally and Celebration Video messages profiling business owners or client/caregiver/families with their story of <i>“How I’m Inspiring Vitality!”</i> ○ Facilitation of Champion Team ○ Quarterly Wellness Webinars (recorded and added to library) ○ Four annual on-site presentations at locations of your choice ○ Monthly Group Wellness Coaching via Zoom ○ Monthly Owners Zoom Strategy Session ○ Wholesale rates (50% off) for Strong Body, Sharp Brain, Endless Energy 	\$2.25 per user per month
Plus Program	<p>All of the Above Plus</p> <ul style="list-style-type: none"> ○ Eight annual on-site presentations at locations of your choice instead of four ○ Monthly Wellness Webinars instead of quarterly (recorded for library) ○ One-on-one Individual Wellness Coaching ○ Custom Online Courses ○ Custom cover with ComForCare logo and foreword for Strong Body, Sharp Brain, Endless Energy ○ Two specialty 4-week challenges of your choice (weight loss, pedometer, stress-less, etc.) 	\$3.00 per user per month

*Proposal is based on an estimate of 16,000 eligible users. A tiered structure is available based on eligible users.

Proposal Review and Contract Execution

The terms of this proposal are valid until May 19, 2019. After that date, terms cannot be guaranteed. We are available for proposal review and adjustment until we arrive at the perfect terms for this exciting project. Thank you for the opportunity to propose this partnership. We look forward to working together to add to the ComForCare mission of *inspiring our clients and caregivers to live their best lives possible.*”