

Request for Quotation

Online Wellness Platform

July 2025

SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

300 E. BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 866-280-7377 • www.ohsers.org



TABLE OF CONTENTS

- I. Introduction
- II. Background
- III. Scope of Services
- IV. Quotation Submissions
- V. Selection Process
- VI. Tentative Time Table
- VII. Criteria
- VIII. Questionnaire
- IX. Terms and Conditions
- Appendix A Questionnaire

I. INTRODUCTION

The School Employees Retirement System of Ohio (SERS) is requesting quotations from online Wellness platform vendors.

II. BACKGROUND

SERS is a statewide defined benefit retirement system for non-certificated persons employed by the public schools within the state's cities, villages and counties, as well as local districts, vocational and technical schools, community colleges, and The University of Akron. Benefits include service retirement, disability and survivor benefits, and access to health care coverage for benefit recipients and their dependents. General administration and management of the plan is vested in the Retirement Board established under [Chapter 3309](#) of the Ohio Revised Code.

For more than 10 years, SERS Staff members have had access to an online wellness platform that has enhanced their engaged their well-being.

Links are available for the most recent [SERS Annual Comprehensive Financial Report](#).

III. SCOPE OF SERVICES

SERS is seeking a qualified vendor to provide an online employee wellness platform and related services:

- Provide a user-friendly online wellness platform with the following features:
 - Access to Health Risk Assessments (HRAs)
 - Access to wellness educational content and resources such as articles, videos, and webinars on various health topics.
 - Prebuilt individual and team-based wellness challenges
 - Ability to track various health and wellness metrics.
 - User-friendly interface for employees to log their activities (steps, sleep, workouts, educational activities, etc.).
 - Integration with popular fitness devices and apps and seamless data synchronization from devices and apps to the platform.
 - Customizable incentives and rewards.
 - Comprehensive reporting tools to monitor employee participation and progress.
 - Custom branding or co-branding options preferred.

- Provide a dedicated client support contact for Human Resources to be responsible for escalated customer service, problem resolution, and expediting services related to overall performance of the contract.
- Technical Requirements:
 - Platform must be web-based and mobile-accessible
 - Single sign-on (SSO) compatibility preferred
 - Robust data security protocols and HIPAA compliant

SERS will consider only quotations for the services as described above.
Responses submitted for other services will not be considered.

IV. QUOTATION SUBMISSIONS

A. Intent to Respond

If the vendor intends to respond to this RFQ, a Notice of Intent to do so should be sent to SERS **by July 30, 2025**. The Notice should be sent by email to the SERS contact listed in Paragraph C. below, and contain the vendor's name, its intent to respond, the name of a contact person and the contact person's telephone number, email. Submitting this Notice will not obligate a vendor to submit a Response nor be a prerequisite for submitting a Response, but will allow SERS to send out any necessary information to interested vendors.

B. Response Deadline

The completed Response must be received by **August 22, 2025, 5:00 p.m. Eastern Daylight Time**. Responses received after the Response deadline will not be considered.

C. Delivery

Contact person for all responses, and communications:

Human Resources Department
School Employees Retirement System
300 East Broad Street, Suite 100
Columbus, OH 43215
Email: HRProcure@ohsers.org
Telephone: 614-340-2255

Response should be sent via email to the contact person listed above.
Faxed transmissions are not acceptable and will not be considered.

D. Response Documents

All of the following documents must be submitted together and in the order listed.

1. A Cover Letter submitting the vendor's Response on the vendor's letterhead signed by at least one individual who is authorized to bind the vendor contractually.
2. The Questionnaire in Appendix A. with the question and/or request duplicated in the Response before the answer or response.

E. Submitted Responses

Any Response submitted will become the property of SERS. SERS reserves the right to retain all Responses submitted, and use any information contained in a Response except as otherwise prohibited by law. **All Responses and the contents thereof will be deemed to be a public record which is open to public inspection after a vendor has been selected and contract has been executed, if any.** A vendor may include one additional copy of its Response with any proprietary trade secret information redacted and marked as such with a brief written basis as to why it believes the information is protected from disclosure. In the event that SERS receives a public records request to which, in SERS' sole discretion, any of a vendor's materials are responsive, SERS may release the vendor's redacted materials, or in the event no redacted materials are submitted, the vendor's unredacted materials without notice to the vendor. In the event any of the vendor's redactions are challenged, the vendor shall have sole responsibility to defend such redactions at its cost and expense. SERS will not institute any legal action to defend any of vendor's redactions, but will notify the vendor of such challenges.

F. Communications with SERS

Vendors which intend to submit a Response should not contact any member of SERS Staff or members of the Retirement Board. An exception to this rule applies to vendors who currently do business with SERS, but any contact made by such vendor(s) with persons should be limited to that business, and should not relate to this RFQ.

G. Questions Relating to this RFQ

All questions concerning this RFQ must be received by email to the Contact person by **August 6, 2025, 5:00 p.m., Eastern Daylight Time.** Answers to emailed questions received by this deadline will be available to all vendors by a posting at www.ohsers.org. Questions submitted after 5 p.m. August 6, 2025 or other than by email will not be considered.

V. SELECTION PROCESS

SERS staff will evaluate all timely and complete Responses. SERS reserves the right to request that any Response be clarified or supplemented.

VI. TENTATIVE TIME TABLE

The following is the tentative time schedule for SERS' search for vendors to provide the requested services. All dates are subject to modification by SERS without prior notice.

Issuance of RFQ:	July 14, 2025
Intent to Respond	July 30, 2025
Question Deadline:	August 6, 2025
Response to Written Questions:	August 13, 2025
RFQ Response Deadline:	August 22, 2025
Projected Commencement Date:	January 1, 2026

VII. CRITERIA

The following minimum criteria are preferred:

- Company profile and relevant experience.
- Quality and comprehensiveness of the proposed platform and its features.
- Pricing structure, including any setup fees and ongoing costs. Multi-year guarantees are preferred and will be considered as part of SERS' evaluation
- References from previous clients.
- Timeline for implementation and support services.

VIII. QUESTIONNAIRE

Vendors must complete the Questionnaire appearing in Appendix A. Responses to the questions should repeat the question and be answered in order. Limit each response to no more than one page.

IX. TERMS AND CONDITIONS

SERS makes no representations or warranties, expressed or implied, as to the accuracy or completeness of the information in the RFQ and nothing contained herein is or shall be relied upon as a promise or representation, whether as to the past or the future. The RFQ does not purport to contain all of the information that may be required to evaluate the RFQ and any recipient hereof should conduct its own independent analysis of SERS and the data contained or referenced herein. SERS does not anticipate updating or otherwise revising the RFQ. However, this RFQ may be withdrawn, modified, or re-circulated at any time at the sole discretion of SERS.

SERS reserves the right, at its sole discretion and without giving reasons or notice, at any time and in any respect, to alter these procedures, to change and alter any and all criteria, to terminate discussions, to accept or reject any Response, in whole or in part, to negotiate modifications or revisions to a Response and to negotiate with any one or more respondents to the RFQ.

SERS is not and will not be under any obligation to accept, review or consider any Response to the RFQ, and is not and will not be under any obligation to accept the lowest quote submitted or any quote at all. SERS is not and will not be under any obligation to any recipient of, or any respondent to, the RFQ except as expressly stated in any binding agreement ultimately entered into with one or more parties, either as part of this RFQ process, or otherwise. Any decision to enter into a binding agreement with a respondent to this RFQ is in SERS' sole discretion.

This RFQ is not an offer but a request to receive a Response. SERS will consider a Response as an offer to develop an agreement based upon the contents of the Response. Respondents agree that the contents of their Responses are valid for one year from the date of submission. SERS will not be liable for any cost incurred in the preparation of a Response and will not reimburse any respondents for their submission. Expenses related to the production of a Response are the sole responsibility of the respondent.

Appendix A

QUESTIONNAIRE

Responses to the following questions should repeat the question and be answered in order. Limit each response to no more than one page.

A. Vendor

Provide a brief description of your firm, including but not limited to the following:

1. Name of the principal(s) of the firm.
2. Name, telephone number, and email address of a representative of the firm authorized to discuss the proposal.
3. Addresses of all offices of the firm. Identify the office that will fulfill this agreement.
4. Number of employees of the firm.
5. Number of years in business under current name and any past corporate names or affiliations.
6. How many clients/employees do you currently serve?
7. What is your client retention rate over the past three years?
8. Provide a minimum of two (2) client references for similar services performed, preferably services performed for public sector clients. Please include name, title, contact information, brief description of services provided, and length of relationship.

B. Personnel

1. Provide an overview of your account structure, including roles and responsibilities of those who would be assigned to SERS to complete the scope of services in this RFQ.

C. Proposed Service

1. Provide an overview of your experience administering an online employee wellness platform and related services.
2. Provide a detailed overview of the wellness platform features and capabilities of the platform and the services you provide. Please include, but not limited to the following:
 - a) How does your platform support online tracking of health and wellness metrics?
 - b) How do employees log their activities and progress?

- c) Is your platform mobile-friendly and what types of fitness devices and apps does your platform integrate with?
 - d) Does your platform offer prebuilt individual and team-based wellness challenges? If yes, please provide examples.
 - e) What types of reporting tools are available to monitor employee participation and progress?
 - f) Can reports be customized for different metrics and time periods?
 - g) Does your platform support customizable incentives or rewards by participation level? If so, please explain.
 - h) What types of wellness themes and educational content are available on your platform?
 - i) How frequently is new content added to the platform?
 - j) Can your platform be co-branded with SERS?
 - k) What differentiates your platform from others?
3. What is the typical timeline for implementing your platform? Provide a proposed timeline for each step of the implementation process that includes the action, the party responsible, member of your account team responsible for each action, and the due date for completion of each action.
 4. What kind of support services do you offer during and after implementation?
 5. Is your platform sign-on (SSO) compatible?
 6. Does your organization have a data security program? If so, what standards and guidelines does it follow to prevent fraud and data breaches?
 7. Who is responsible for managing your information security and privacy program?
 8. Please provide a link to your public information security and/or privacy policy
 9. How do you ensure the security and privacy of employee data on your platform?
 10. Is your platform compliant with relevant health and data protection regulations?
 11. Explain any requirements in the Scope of Services that cannot be met.

D. Standards of Conduct

1. Does the firm have a firm written code of conduct or set of standards for professional behavior? If so, attach a copy and state how they are monitored and enforced.
2. Does the firm have a written anti-discrimination policy? If so, attach a copy and state how the policy is monitored and enforced.
3. How does the firm identify and manage conflicts of interest?
4. Are there any potential conflicts of interest that the firm would have in providing the requested services to SERS? If yes, explain.
5. List and describe any relationships and/or contacts the firm or its officers or employees have had with any SERS Retirement Board member and/or staff member within the last 12 months.
6. Has the firm or any officer or employee given any remuneration or anything of value directly or indirectly to SERS or any of its Retirement Board members, officers, or employees? If yes, identify the recipient and remuneration or thing of value. Additional information on the Ohio ethics law in this area may be found at:

http://www.ethics.ohio.gov/Retirement_System_Information_Sheet.html.

7. Has the vendor or any officer, principal or employee given any remuneration or anything of value such as a finder's fee, cash solicitation fee, or fee for consulting, lobbying or otherwise, in connection with this RFQ? If yes, identify the recipient and remuneration or thing of value.
8. Within the last five (5) years:
 - a. Has the vendor or any officer or employee of the vendor been a defending party in a legal proceeding before a court related to the provision of services?
 - b. Has the vendor or any officer or employee been the subject of a governmental regulatory agency inquiry, investigation, or charge?
 - c. Has the vendor submitted a claim to the vendor's liability insurance carrier involving the type of services sought under this RFQ?

If yes to any of the above, describe the event and the current status or resolution; include any case citation.

E. FEES AND PRICING STRUCTURE

The cost of services is one of the factors that will be considered in awarding this contract. Please provide a thorough breakdown of your proposed fees for this engagement.

1. Provide a detailed fee schedule, including per participant per month costs or subscription fees, and any additional ongoing maintenance fees.
2. Include any implementation, set up, training, integration, reporting, or other hidden fees.
3. Include a sample contract.