



Preliminary Wellbeing Analysis | 2017

Fidelity Information Services





Preliminary FIS Wellbeing Analysis

FIS has expressed a desire to enhance its current Wellbeing program by upgrading its social technology, mobile application, year-long member engagement and individual and population health management.

On June 19, 2017 CBIZ presented a high level overview of capabilities and pricing for the following Wellbeing vendors:

HEALTH FITNESS – Incumbent
BCBS (Rally) – Medical Plan administrator
VITALITY – Prior SunGard provider
HEALTH ADVOCATE – Current employee advocacy
BRAVO
ADURO
CAREHERE
VIRGIN PULSE

Based on this meeting and additional input from FIS, it was decided to entertain vendor presentations from:

- Vitality
- JIF / Castlight
- Redbrick
- ADURO
- Virgin Pulse

These presentations were conducted at FIS on July 12, 2017. Each firm was given an hour and a half to present their Wellbeing philosophy, technology, innovation, communication and engagement methodologies. They were graded using CBIZ's Wellness and Health Management Evaluation Matrix (see attached scoring developed by CBIZ). Utilizing this matrix and direct input from FIS attendees, three finalists were selected:

- ADURO
- Virgin Pulse
- Vitality

In addition, it was decided to not renew the existing contract with Health Fitness which is due to expire on September 14, 2017.





CBIZ has reached out to the three finalists and requested:

- Best and final pricing
- Draft, FIS specific contract to include performance guarantees
- Three to five references of comparable size, industry and demographics
- Gross revenues, number of employees, number of clients, and account manager to client ratio
- Definition of member engagement and historical percentage of members engaged verses total eligible members
- Demo / WebEx on user applications, tools and engagement

During these discussions with the three finalists, the following was developed:

- Virgin Pulse can / will develop a member metric similar to Vitality's "Vitality Age" or Rally's "Rally Age"
- ADURO does not use a chronological verses health age metric. They have a cascading HRA evaluation that will be demonstrated.
- All three finalists require a contract term of 3 years
- Virgin Pulse's final pricing will be flat for the 3 years. We have requested same from Vitality and ADURO.
- ADURO addressed the issue of their partnership with Limeade and a potential PE or VC acquisition:
 - ✓ ADURO as an entity is \$30 million profitable
 - ✓ ADURO has no external capital, i.e. no PE or VC investment
 - ✓ There is no intent on the part of ADURO's internal ownership to sell. There is no active money chasing them
 - ✓ Limeade does not control any of ADURO's OEM or product
 - ✓ ADURO's contract with Limeade contains multi year extensions in the unlikely event of a parting of the ways
 - ✓ Limeade can be replaced

At present CBIZ considers ADURO and Virgin Pulse as the preferred two vendors. Upon receipt of the requested additional information from the three finalists to include their demos, we will revise / complete the Wellness and Health Management Matrix, consult with FIS and provide our final recommendations.

Please advise any questions or concerns.



**FIS Wellness and Health Management
Evaluation Matrix
July 11-12, 2017**

Wellness Functionality Rating Sheet

Each Vendor is rated on each desired functionality, using a 1 (low) - 5 (high) point scale

Desired Functionality	Redbrick	Aduro/Limeade	Virgin Pulse	Jif/Castlight	Vitality
<i>Experience with clients like FIS (over 10K, Financial services, software and sales services)</i>	3	3	4	5	4
<i>Account Management Structure</i>	3	3	3	3	3
<i>Innovation and product development</i>	3	5	4	3	3
<i>Communication methods</i>	4	4	4	4	3
<i>Ease of use and engagement methods</i>	3	4	4	5	2
<i>Branding and customization to client</i>	4	4	4	5	3
<i>Health Assessment/Wellbeing Assessment</i>	4	4	4	4	5
<i>Social Technology and Mobile Applications</i>	4	4	5	5	4
<i>Challenges, competitions and interventions</i>	3	3	3	3	4
<i>Telephonic and Digital Coaching (Lifestyle Management)</i>	3	3	3	3	4
<i>Disease Management</i>	3	4	3	2	3
<i>Incentives administration</i>	4	4	4	4	4
<i>Outcome based tracking/reporting/incentives</i>	4	4	3	4	4
<i>Device Integration</i>	4	4	4	5	4
<i>Integration of claims and Rx data, risk/cost analysis</i>	4	4	4	2	4
<i>Integration with other providers</i>	5	5	5	5	5
<i>Wellness Administrator/Wellness Captain's site</i>	4	4	4	4	4
<i>HIPPA/Compliance Protocols (reports, technology, etc)</i>	4	4	4	4	4
<i>Reporting (engagement, results, population metrics)</i>	4	4	4	4	4
<i>Biometrics</i>	4	4	4	4	4
<i>Health Fair On-site support</i>	4	4	4	3	4
<i>Price/Value of Investment</i>	2	3	5	1	4
<i>Performance Guarantees</i>	4	5	4	4	4
Total Points	84	90	90	86	87

Pros

Cons

