



Request for Proposal (RFP) Response

# **EAP Services for the Oldham County Board of Education**

Prepared by:

**Carelon Behavioral  
Health, Inc.**

Submission date:

**May 5, 2026**

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RFP #: 2026-04

**Kate Luxemburger**

Administrative Assistant, Oldham County BOE  
6165 W. Hwy. 146, Crestwood, KY 40014

May 5, 2026

Dear Ms. Luxemburger,

Carelon Behavioral Health, Inc. (“Carelon”) is pleased to submit our proposal to continue providing Employee Assistance Program (EAP) services for the Oldham County Board of Education (OCBE). We are especially proud of our long-standing partnership with your organization, which dates back to 1994, and we value the trust you have placed in us to support your employees and their families for more than three decades.

At Carelon, we believe that when individuals are supported in living healthier, more balanced lives, they are better able to contribute meaningfully in their roles. This is particularly important within a school district environment, where educators, administrators, and support staff play a critical role in shaping student outcomes and community well-being. We recognize the unique pressures faced by school employees including workload demands, student and family needs, and the emotional investment required in education. We are committed to providing support that is relevant, accessible, and impactful.

As your current EAP partner, we understand your organization, culture, and the evolving needs of your workforce. The Oldham County Board of Education is not seeking a new vendor, but rather a continued partner who can build upon an already strong foundation while enhancing engagement, access, and overall program value. Our proposal reflects both continuity and innovation, working to maintain the strengths of your existing program while introducing enhancements designed to further support your employees.

With more than 40 years of experience and a national footprint, Carelon delivers a clinically led, whole-person EAP model that integrates counseling, work/life, legal, and financial services into a seamless experience. Our approach is proactive, multi-channel, and designed to remove barriers to care to ensure employees and their families can get support when and how they need it.

We are particularly aligned with the Oldham County Board of Education’s priorities, including:

- Maintaining strong, trusted EAP services for employees and their families
- Enhancing access to timely, convenient care
- Increasing awareness and engagement across a diverse school-based workforce
- Supporting leaders, administrators, and staff through everyday challenges and critical moments
- Providing clear, actionable insights to support ongoing program improvement

We are honored to continue our partnership with the Oldham County Board of Education and look forward to building on our shared success to further support the well-being of your employees and the students and communities they serve.

Thank you for your continued partnership and consideration.

Sincerely,

A handwritten signature in black ink that reads "Tina M. McBreen".

**Tina M. McBreen**

Director of Employer Account Management  
Carelon Behavioral Health  
[Tina.McBreen@carelon.com](mailto:Tina.McBreen@carelon.com)

# Executive Summary

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## Introduction

Carelon Behavioral Health (Carelon) values its long-standing partnership with the Oldham County Board of Education (OCBE) and appreciates the opportunity to continue delivering a high-impact Employee Assistance Program (EAP) that supports the well-being, resilience, and effectiveness of your employees and their families.

Since 1994, Carelon has supported the Oldham County Board of Education with EAP services, building a deep understanding of your organization, workforce, and priorities. Our commitment remains the same: to make it easy for your employees to access meaningful, relevant support early, easily, and without barriers, so they can thrive both personally and professionally.

Within a school district environment, employees play a vital role in supporting students, families, and the broader community. When educators and staff experience stress, burnout, financial concerns, or personal challenges, it can impact not only their well-being, but also their ability to perform at their best. Our EAP is designed to provide the right support at the right time, helping your workforce remain engaged, resilient, and supported.

## A Solution Designed for OCBE

Carelon's EAP is intentionally designed to meet the needs of educational organizations by supporting a diverse workforce that includes teachers, administrators, and support staff across multiple locations and roles.

As a current partner, we recognize that the Oldham County Board of Education is seeking to build upon an established program by:

- Maintaining continuity of trusted services
- Enhancing ease of access and timeliness of care
- Increasing awareness and engagement across employees
- Providing practical support for both employees and leadership
- Delivering meaningful reporting and insights

Our approach reflects these priorities by combining proven service delivery with targeted enhancements that improve the overall experience and impact of the program.

## A Proactive, Accessible, and Engaging EAP

Traditional EAPs are often underutilized and reactive. Carelon's model focuses on early engagement and ease of access.

We "widen the funnel" so more employees feel comfortable using the program through:

- Multi-channel access, including phone, video, digital platform, and in-person care
- Clinical-first intake and navigation to guide employees to the right support quickly
- A digital member platform for self-service tools and scheduling
- Proactive communication and engagement campaigns tailored to a school-based workforce

This approach reduces stigma, increases awareness, and positions the EAP as a trusted, everyday resource.

## Supporting School Employees and Their Unique Needs

Your employees face distinct challenges, including workload pressures, emotional demands, and balancing professional and personal responsibilities.

Carelon supports this population with:

- Confidential, accessible counseling services
- Resources for stress, burnout, and work-life balance
- Financial and legal consultation services
- Work/life support for everyday needs
- Flexible access options that fit school schedules and environments

Our approach ensures that support is practical, relevant, and easy to access for all employee groups.

## Supporting Leaders and Your Organization

An effective EAP supports not only individuals, but also the organization as a whole.

Carelon provides 24/7 manager consultation and organizational support to help leaders:

- Address employee performance and behavioral concerns
- Navigate sensitive or complex situations
- Support staff effectively during challenging circumstances
- Foster a healthy and supportive workplace culture

This strengthens leadership effectiveness while supporting employee well-being.

## Driving Engagement Through Targeted Communication

Sustaining and increasing engagement is a key opportunity for an established program.

Carelon's engagement strategy:

- Delivers targeted messaging for different employee groups
- Uses multiple channels (digital, print, onsite, and events)
- Measures performance and continuously improves outreach efforts

Our goal is to ensure every employee understands:

- What resources are available
- How to access them
- That the program is confidential, relevant, and easy to use

## Data-Driven Insights and Continuous Improvement

Carelon provides robust reporting that delivers:

- Clear visibility into program utilization
- Insight into employee needs and trends
- Outcome measures related to well-being and productivity

This enables the Oldham County Board of Education to monitor performance and continuously enhance program impact.

## **A Trusted Partner — Continuing the Journey**

Carelon's relationship with the Oldham County Board of Education is built on decades of partnership, trust, and shared commitment to employee well-being.

Our dedicated account team will continue to:

- Align services with your evolving needs
- Enhance engagement and program visibility
- Monitor performance and recommend improvements
- Ensure the program continues to deliver meaningful value

## **Conclusion**

Carelon's proposal reflects both continuity and innovation, working together to maintain the strong foundation of your existing EAP while enhancing access, engagement, and overall impact.

Our program is:

- Accessible and responsive
- Relevant to a diverse school-based workforce
- Engaging and easy to use
- Data-driven and outcome-focused

We are honored to continue our partnership with the Oldham County Board of Education and remain committed to supporting your employees, strengthening your organization, and contributing to the success of the communities you serve.

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**Attachment C:  
Vendor  
Proposal  
Response  
Template**

## **Oldham County Board of Education**

### **EAP Services — Vendor Proposal Response Template**

**RFP #:** 2026-04 | **Due:** May 5, 2026 by 12:00 PM EST

*Instructions: Complete all sections in full. Do not alter the template structure. Attach additional pages as needed, labeled by section number. Incomplete responses may be deemed non-responsive.*

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#### **SECTION 1 — QUALIFICATIONS & BACKGROUND**

**1.1** Provide a brief company overview, including experience with K-12 or public sector organizations and any prior relationship with Oldham County Schools.

*Response:*

Carelon Behavioral Health, Inc. (Carelon) is a leading behavioral health services company serving one out of six people across all 50 states. We work with employers, health plans, and government agencies to support mental health and emotional well-being, crisis and foster care, substance use disorder recovery, and employee health programs that improve the health and wellness of people every day. Our whole person health approach integrates social, behavioral, and physical health solutions to drive improved outcomes throughout an individual's health journey. We collaborate with a national network of providers in communities across the country so that individuals can live their lives to the fullest potential.

Carelon offers Employee Assistance Programs (EAPs) that include wraparound legal, financial, and work/life services to promote health and well-being. Our approach to the traditional EAP distinguishes Carelon by supporting the whole person resulting in a healthier, more productive workforce. Our innovative engagement and clinical expertise make it easier for employees and their family members ("members") to get help — how and when they want it.

Carelon is the current EAP Program provider for the Oldham County Board of Education. In addition to OCBE, we provide EAP services to 21 other K-12/public sector organizations.

**1.2** List relevant certifications, accreditations, or professional affiliations.

*Response:*

Carelon Behavioral Health, Inc., is currently accredited by the National Committee for Quality Assurance (NCQA). NCQA awarded Carelon Behavioral Health, Inc., full accreditation under the Managed Behavioral Health Organization (MBHO) standards. Full Accreditation is granted for three years to organizations that have excellent programs for continuous quality improvement and meet NCQA's rigorous standards. NCQA-accredited since 2000, Carelon is a quality-driven organization with the framework in place to continually assess and improve the clinical care and services we provide, and we passed our most recent accreditation assessment with 100%. The accreditation is scheduled for renewal in October 2026.

Although Carelon Behavioral Health, Inc. is not currently accredited by NCQA for health equity, our Pennsylvania entity was awarded NCQA Health Equity Accreditation (HEA) in 2024. Carelon is exploring the possibility of a companywide NCQA HEA in terms of timing and coordination.

Undergoing the rigorous process of Health Equity Accreditation will ensure we are well-positioned to deliver quality, equitable health care to members. This accreditation process will bring direct benefit to the Oldham County Board of Education's behavioral health program because it will enable Carelon to better identify individuals with care gaps, provide targeted interventions, and better manage whole-person care.

Health Equity Accreditation provides the framework for organizations to capture and use data to identify and better address disparities in health care delivery, thus supporting better health outcomes. Health Equity standards are firmly grounded in national Culturally and Linguistically Appropriate Services (CLAS) standards and include:

- Ensuring Carelon has a recruiting and hiring process that provides a foundation of inclusion, equity, and diversity as well as annual diversity and inclusion training for staff.
- Collection of member-level data including language, gender identity, sexual orientation, and race/ethnicity while ensuring privacy protections for data collection and use of data.
- Requiring Carelon to ensure availability and access to language services including quality of written and timeliness of translations. In addition, Carelon must support providers in offering competent language services to meet members' needs in-person, by video, or by telephone.
- Carelon must ensure the provider network is culturally responsive to the member's needs as well as ensuring covered services are provided.
- Data gathered from the cultural, linguistic, and ethnic needs of the members is used to evaluate gaps in the provider network leading to the development, monitoring, and evaluation of a plan to address those gaps.
- Carelon must have a culturally and linguistically appropriate program description with measurable goals and actions to meet the needs of the multicultural populations served. These goals are evaluated at least annually to ensure improvement of CLAS and reduction of the healthcare disparities in the populations served.
- Carelon must use population-level data to reduce disparities and improve access to covered services. At least three HEDIS measures will be used to evaluate the decrease in healthcare disparities focusing specifically on race/ethnicity, preferred language, and gender identity/sexual orientation. Member experience survey data will also be used to evaluate the effectiveness of programs related to race/ethnicity or preferred languages.

We believe completing this rigorous accreditation process will transform Carelon into an organization that is even more capable of serving the behavioral health needs of members and families.

**1.3 Identify any subcontractors involved in service delivery (name, services provided, contact info).**

**Response:**

To enrich the comprehensive EAP services we offer, Carelon has long-standing partnerships with the following organizations that are leaders in their respective field, share our dedication to quality, and are fully integrated into our service offering. This includes:

**American Substance Abuse Professionals**

- Length of relationship: 21 years
- Programs/services: Provides Department of Transportation (DOT) Substance Abuse Professional (SAP) services, drug and alcohol testing, SAP referrals and qualification courses

- Contact information: Tara Sauers, Senior Business Development Manager; (410) 366-3899 ext.139; tsauers@go2asap.com

**Balancing Life's Issues**

- Length of relationship: 3 years
- Programs/services: Health and wellness trainings
- Contact information: Wendy Wollner, Chief Executive Officer; (914) 643-0527; wendy@balancinglifissues.com

**CLC, Inc.**

- Length of relationship: 24 years
- Programs/services: Legal services
- Contact information: Ian Bailey, President; (800) 541-9701, ext. 63315; ibailey@clcadvantage.com

**My Secure Advantage**

- Length of relationship: 24 years
- Programs/services: Financial services
- Contact information: Jonathan Maceda, Vice President, Sales; 202-360-0749; jmaceda@mysecureadvantage.com

**R3 Continuum**

- Length of relationship: 23 years
- Programs/Services: Supplemental critical incident response delivery
- Contact Information: Erin Tonda, J.D., CRT, Senior Director, Customer Partnerships; (616) 304-1102; erin.tonda@r3c.com

**Workplace Options**

- Length of relationship: 15 years
- Programs/services: Work/Life services
- Contact information: Kelli Caiafa, Senior Account Manager; 919-807-9871; Kelli.Caiafa@workplaceoptions.com

All of the subcontractors identified above may be providing services to the Oldham County Board of Education as part of our program offering. The costs associated with these services are included in our pricing template.

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**SECTION 2 — COMPLETE SERVICE OFFERING & COST**

**Instructions: List EVERY service your company offers, including all services outlined in the RFP as well as any additional services not listed. For each service, provide the delivery method and the associated cost. If a service is included at no additional cost within a package, note that in the cost column. Use additional rows as needed.**

**2A — Counseling Services**

<b>Service</b>	<b>Offered? (Y/N)</b>	<b>How Delivered</b>	<b>Cost Per Employee / Per Use / Included</b>
<i>In-Person Counseling</i>	Y	Provider network – licensed counselors	Per issue/per year and included in PEPM
<i>Phone Counseling</i>	Y	Provider network – licensed counselors	Per issue/per year and included in PEPM
<i>Online/Video Counseling</i>	Y	Provider network – licensed counselors	Per issue/per year and included in PEPM
<i>24-Hour Crisis Hotline</i>	Y	In-house licensed providers or R3 vendor	Fee for service rates (after bank of hours is depleted): Standard: \$365/hr (2 hr min) Same day: \$425/hr (2 hr min) Immediate: \$520/hr (2 hr min)
<i>Fitness for Duty Referrals</i>	Y	In-house licensed providers	Fee for service rates: Psychological: \$4,680 Psychiatric: \$5,230 Psychiatric w/ threat of violence: \$6,415 Neuropsychological: \$6,435
Work Life Services - Personalized assistance navigating complex life challenges such as financial stress, housing, and family needs.	Y	Live virtual	Unlimited included in PEPM

***Minimum sessions per employee, PER ISSUE, per year:***

The current Oldham County Board of Education EAP Program offers 10 sessions, per issue, per year. This is what we quoted for this RFP. We can offer any session model that you'd like and are happy to quote additional session models.

***Average appointment wait time:***

Routine appointments – 3 days. Urgent appointments – 1 day.

## 2B — Legal Services

<b>Service</b>	<b>Offered? (Y/N)</b>	<b>How Delivered</b>	<b>Cost Per Employee / Per Use / Included</b>
Divorce	Y	Telephonic/virtual consultation with an attorney; referral to local network attorney for ongoing representation	Included in PEPM rate. 30-minute consultation per matter at no cost. 25% discount on subsequent services
Family Law Matters	Y	Telephonic/virtual consultation and referral to qualified local attorney	60-minute consultation at no cost and 35% discount on subsequent services
Landlord/Tenant Issues	Y	Telephonic/virtual consultation and referral to qualified local attorney	Included in PEPM rate. 30-minute consultation per matter at no cost. 25% discount on subsequent services
Real Estate Transactions	Y	Attorney consultation and referral for home purchase, sale, and related matters	Included in PEPM rate. 30-minute consultation per matter at no cost. 25% discount on subsequent services
Wills and Power of Attorney	Y	Consultation plus access to online legal forms and attorney support for document preparation	Included in PEPM rate. 30-minute consultation per matter at no cost. Completed Will and Testament – \$199
Civil Lawsuits and Contracts	Y	Legal consultation and referral to attorneys for contract review and civil matters	Included in PEPM rate. 30-minute consultation per matter at no cost. 25% discount on subsequent services
Identity Theft Recovery	Y	Consultation plus access to identity theft counseling and recovery support resources	Included in PEPM rate. 30-minute consultation and up to 60 minutes of ID theft counseling. Additional services available at member cost
Mediation Services	Y	Telephonic/virtual mediation consultation and referral to certified mediators	Included in PEPM rate. 30-minute consultation. 25% discount on mediation services

Criminal Matters	Y	Immediate referral to qualified attorneys with 24/7 access for urgent matters	Included in PEPM rate. 30-minute consultation per matter at no cost
Legal Forms & Document Library	Y	Online access to personal and business legal forms, articles, and resources	Included in PEPM rate
General Legal Consultation (120+ areas of law)	Y	Telephonic consultation with attorney and coordinated referral to local provider	Included in PEPM rate. 30-minute consultation per matter at no cost
Immigration / Administrative / Specialty Law	Y	Consultation and referral to specialized attorneys within national network	Included in PEPM rate. 30-minute consultation per matter at no cost. Discounted follow-up services

**2C — Financial Services**

<b>Service</b>	<b>Offered? (Y/N)</b>	<b>How Delivered</b>	<b>Cost Per Employee / Per Use / Included</b>
Saving for College	Y	1:1 money coaching, digital tools, and webinars on college funding strategies	Included in PEPM
Debt Consolidation	Y	Personalized coaching to create debt management plans, supported by digital tools and education	Included in PEPM
Mortgage Issues	Y	Coaching on home buying, refinancing, and mortgage planning via 1:1 sessions and resources	Included in PEPM
Estate Planning	Y	Guidance through 1:1 coaching and educational resources on estate considerations	Included in PEPM
General Tax Questions	Y	Access to credentialed coaches (e.g., CPA/EA) for general tax guidance via coaching sessions	Included in PEPM
Retirement Planning	Y	Retirement readiness coaching, planning tools, and educational workshops	Included in PEPM
Family Budgeting	Y	Budget planning support through 1:1 coaching, calculators, and digital platform tools	Included in PEPM
Student Loan Support	Y	Coaching and tools to manage repayment strategies and loan optimization	Included in PEPM
Credit & Financial Health	Y	Credit review guidance and financial health coaching via certified counselors	Included in PEPM
Financial Goal Setting	Y	Ongoing coaching relationship focused on goal setting, behavior change, and accountability	Included in PEPM
Emergency Savings Planning	Y	Coaching and digital tools to build short-term savings strategies	Included in PEPM
Life Event Financial Support (e.g., new baby, caregiving, loss)	Y	Personalized coaching and targeted education for major life transitions	Included in PEPM

Identity Theft & Financial Risk Education	Y	Guidance from certified specialists and educational resources	Included in PEPM
Group Financial Education	Y	Webinars, workshops, and onsite/virtual events on 28+ financial topics	Included in PEPM

## 2D — Online Resources

<b>Topic</b>	<b>Offered? (Y/N)</b>	<b>Description</b>	<b>Cost Per Employee / Per Use / Included</b>
<i>Depression</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Marriage and Relationships</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Stress Management</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Anxiety</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Conflict Management</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Weight Management</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
<i>Communication</i>	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
Hundreds of other topics	Y	Digital Wellbeing website – articles, webinars, podcasts, assessments, and more!	Included in PEPM
Online provider matching and appointment scheduling	Y	Digital Wellbeing website	Included in PEPM

**Platform access (web/app/other):** Web and mobile app

**Content update frequency:** Monthly

**2E — Additional Services Not Listed Above**

Use this section to list any services your company offers that are not captured above.

<b>Service</b>	<b>Category</b>	<b>How Delivered</b>	<b>Cost</b>
Customized Training	Live training	In person or virtual	Fee for Service after Bank of Hours is depleted: Standard training/webinar: \$350/hr Silver Podcast: \$250 Gold Podcast or video: \$495 Premium Training: \$525/hr
Manager/ Leadership Support	Live Virtual support	Consultation, tools, and training to help leaders address employee concerns, reinforce safety, and support team performance	Included in PEPM
eM Life	Digital Mindfulness / Well-being	Personalized mindfulness platform delivered via web and mobile app; includes live instructor-led sessions, on-demand content, short practices, and multi-week immersive programs focused on stress, resilience, sleep, and emotional well-being	Buy-up offering (+\$.03 add to PEPM)
Learn to Live	Digital Behavioral Health (CBT)	Self-directed digital CBT programs with clinical assessments, personalized recommendations, and optional 1:1 coaching via text, phone, or email; includes webinars, toolkits, and interactive resources	Buy-up offering (+\$.03 add to PEPM)

**SECTION 3 — PRICING SUMMARY**

	<b>Cost</b>
<b>Cost Per Employee Per Year (Full Package) - Year 1</b> <i>Rates include a bank of 4 hours for trainings, critical incidents, etc.</i>	\$32.28
<b>Cost Per Employee Per Year (Basic Package, if applicable)</b>	NA
<b>One-Time Setup / Implementation Fee</b>	NA
<b>Any Additional or Overage Fees</b>	NA
<b>Estimated Total Annual Cost (1625 employees)</b>	\$52,455

Multi-year or volume discount available?  Yes  No — If yes, describe:

Response:

By doing a multi-year contract, you are offered a flat increase year over year. These annual rate increases are significantly less than the rate increase typically experienced during a formal contract renewal.

**Contract Term Acknowledgment:** The initial contract period is three (3) years from the date of signing, with up to two (2) optional one-year renewals at OCBE's discretion.

**X** We acknowledge and agree to the contract term as stated above.

If your pricing varies by contract year, please provide detail below:

<b>Year</b>	<b>Cost Per Employee Per Year</b>	<b>Estimated Total Annual Cost</b>
Year 1	\$32.28	\$52,455
Year 2	\$33.36	\$54,210
Year 3	\$34.44	\$55,965
Year 4 (Optional Renewal)	\$35.52	\$57,720
Year 5 (Optional Renewal)	\$36.70	\$59,653

## **SECTION 4 — CUSTOMER SERVICE & EMPLOYEE ACCESSIBILITY**

*This section is a priority area for evaluation. OCBE is committed to ensuring employees feel supported and can easily access the services they need.*

**4.1 Describe how employees access EAP services (e.g., phone, web portal, app, direct scheduling). How many ways can an employee reach your company?**

### **Response:**

Carelon has taken steps to increase access to its network during high demand for EAP and mental health services by providing several access points for participants to connect with our providers. Oldham County Board of Education employees and their family members can connect with Carelon Wellbeing providers and services via our Digital Front Door (DFD) via chat or by calling the dedicated toll-free number 24 hours a day, 365 days a year.

Carelon also provides the Oldham County Board of Education with a number of digital and virtual programs such as Talkspace, Learn to Live, and eMindful to expand the reach of our nationwide EAP network of providers.

For routine EAP counseling, appointments are offered within five business days, and urgent appointments are offered within 48 hours.

Additional detail on our intake and assessment process, and increased network access is provided below.

### **Intake Process**

Our intake is designed to identify a participant's presenting concerns as well as assess their overall well-being, leveraging tools such as Columbia Suicide Screener and brief SUD screening questions.

Our intake process is flexible enough to naturally allow for a conversation and encourage our intake team to probe for other aspects of well-being. Our intake team can then assess and identify individuals' strengths and address challenging areas based on their presenting issue and total well-being.

The goal of our comprehensive intake is to obtain better data and insight about a participant's total health needs by asking, "How else can we make things better for you?"

We see each interaction with a participant as an opportunity to build trust. We take the time to educate participants on the full range of resources that we offer. For example, we often find that helping a participant solve a practical problem they are struggling with, such as relocation, finding affordable childcare, or locating a contractor for a home repair, aids us in building a trusting relationship. Establishing ourselves as a useful resource leads to participants' comfort with our services, which makes them more likely to reach out to us for other needs. We believe that if someone feels supported during the first, initial contact, they will consider us in the future when a more serious or clinical issue might arise.

This driving principle ensures that we view every interaction as immensely important, which motivates our staff to make every interaction a great experience for the participant. Our staff understands that meeting an individual's need is an audition for the chance to meet other needs. Lastly, we know that each satisfied individual is more likely to recommend our services to co-workers.

Following the intake and assessment process, if it is evident that the needed services are beyond the parameters of the EAP, Carelon will identify the most appropriate referral to address the participant's assessed clinical and non-clinical needs. Appropriateness incorporates not only the quality and scope of

the services, but also the cost, logistics, and location. We store information in our BenefitConnect system which details the Oldham County Board of Education benefits for your employees. Carelon can refer individuals to a wide variety of resources, as appropriate, including services provided by Oldham County Board of Education's medical plan, behavioral health benefits for specialized psychiatric and substance use care, disability benefits, and other Oldham County Board of Education benefits.

### **Digital Front Door**

Similar to the call center experience, Carelon offers Oldham County Board of Education access to our Digital Front Door which enables participants and providers to engage seamlessly across digital platforms with on-demand options for care. The digital portal intake and assessment experience provide tailored access to telephone and video counseling sessions, self-management tools, online therapy and counseling, and access to in-person providers, allowing convenience and choice for the user. Participants also have direct access to digitally register for services.

Our digital platform allows us to reach even more people, including those who are less likely to pick up the phone as it mirrors the telephonic experience and addresses the following:

- Explains program benefits relevant to the participant's situation
- Offers access to services digitally, via phone, or with in-person providers
- Allows for telehealth self-scheduling for participants who prefer counseling sessions via phone or video, or for them to receive authorization for in-person counseling with a provider

Additionally, our platform leverages a curated digital behavioral solution and ecosystem partners to extend access for participants. The platform includes:

- Behavioral health content for self-management and education
- Access point to an enhanced provider directory where participants will find an expanded network of EAP providers and can request or schedule an appointment
- Care navigation to guide participants to appropriate levels of care and content

### **Telehealth**

To increase access to our network, we have partnered with a number of national telehealth networks and have conducted targeted geographical recruitment to identify providers in high need areas. Carelon offers the largest virtual telehealth network with next-day access in most states. Our telehealth platform is a proven secure and confidential option to expand access to behavioral health care, especially in underserved communities and rural areas. Telehealth offers OCBE employees convenient and accessible care options, such as:

- Telehealth appointments scheduled through our nationwide network of EAP providers who also offer live, face-to-face sessions. Participants can self-schedule counseling appointments via our Carelon Wellbeing digital engagement platform.
- Talkspace — a digital solution that is fully integrated with Carelon's core EAP services. This virtual service connects participants with licensed mental health providers for counseling, therapy, and medication management support, and offers a digital front door to access services at their convenience. Once the participant chooses a Talkspace provider, all care is delivered through a private and secure digital platform.
- Synchronous and asynchronous therapy (age 13+) — Participants can book live sessions for real-time conversations with their dedicated therapist. Modalities utilized for live sessions include live messaging, live audio, and/or live video. Alternatively, participants can connect with a counselor asynchronously via text, voice, or video messaging. The counselor will get back to the participant no less than twice per day, five days a week.
- Self-guided programs (Learn to Live, eMindful) — online self-help tools and educational materials designed by clinical experts to support the needs of adults, teens, and couples to support their mental health journey.

- To develop an omnichannel experience in stages, we are also developing a mobile app to further enhance our member experience.

**4.2** *What are your hours of availability for employee-facing support (not including crisis hotline)?*

**Response:**

Carelon provides nationwide clinical staff 24/7/365 to respond to all member calls for emergent and urgent care (EAP). Carelon's behavioral health clinicians are available 24/7 for member crisis calls.

Members/families can access the member portal 24/7.

Coaches are available 24/7 through app, text, email, and phone.

Live chat is available from 8 a.m. to 8 p.m. ET.

**4.3** *What is your average response time when an employee reaches out for the first time?*

**Response:**

Immediate and through case closure. Our program provides immediate response to a member in need of any work/life or social driver of health need. Whether a member outreach occurs through an SDOH Resource Coordinator onsite or through our toll-free number. The Resource Coordinator will assist your employee in that moment to locate the community resources, complete necessary applications, address food or housing insecurities, or transportation, among others. Additionally, a dedicated team will remain engaged with your employee through from case opening through closure. Our program measures the outcome through a closed-loop referral following the completion of a social driver of health and health-related social needs screening.

Response times vary based upon the incident. For incidents requiring an immediate response, we can coordinate support virtually or onsite within three hours. Critical incidents not requiring immediate response are typically coordinated within 24 to 72 hours from the incident. The EAP Workplace Consultant can recommend an appropriate response time based on information shared by the worksite representative. All calls are answered in under 30 minutes when a member contacts our hotline.

**4.4** *Describe your process for following up with employees after initial contact to ensure their needs are being met.*

**Response:**

After an employee contacts us through our digital platform or call center staff, with their permission, we'll reach out via email as a primary method of follow-up. At this time, we'll also inform the employee of additional services, assess their well-being, and gauge their satisfaction with the services rendered. We will follow up multiple times to identify and provide services for any secondary concerns that may arise after the initial intake call. This feedback loop ensures we address employee needs after a referral to services.

We ask every employee during their initial engagement for permission to follow up using the following methods:

- **Emergencies:** We obtain an immediate face-to-face appointment for the employee and follow up by telephone to ensure employees received assessment.
- **Urgent situations:** We will facilitate a face-to-face assessment for employees within 48 hours. We contact employees if they are not present for the appointment. If we are unable to reach employees, we'll make two additional attempts by telephone over the next 48 hours.
- **Routine referrals:** Our robust follow-up process includes the following three email communication touchpoints. Employees can opt out of email communications at any time.
  - 1st Standard Follow up (seven days): Employee satisfaction and inquiry regarding any additional services needed
  - 2nd Standard Follow up (30 days): Address secondary issues and provide suggested services. Services are tailored based on employee input during the initial intake process online or via a call center. We will encourage re-engagement by increasing awareness and visibility of available services including work/life, legal/financial, and counseling.
  - 3rd Standard Follow up (60 days): Reassessment of presenting issues.
- **Management referrals:** We maintain ongoing communication with the treating provider to ensure the employee is participating in any recommended treatment and aftercare. With the proper release forms in place, we will communicate to the referring manager whether or not the employee is complying with their plan of action.

Carelon measures outcomes and progress throughout an employee's journey using the following evidence-based methods:

- Reporting on engagement rates, timeliness of access to services, and timeliness and outcomes of follow-up.
- Capturing and reporting intake data that reflects all five domains of well-being.
- Tracking cross-referrals to other services.
- Assessing productivity results, including absenteeism and presenteeism.
- Tracking employee responses to the assessment.
- Measuring employee satisfaction with EAP services and network providers via a third-party survey.

#### *4.5 How are employees made aware of available services (onboarding materials, digital resources, employer communications, etc.)?*

##### *Response:*

We meet employees where they are. We partner with OCBE to build a communications strategy that reduces stigma and increases utilization. We provide a full suite of core materials such as flyers, posters, orientation videos, etc.

We keep engagement fresh with monthly campaigns tied to relevant topics. We map out the year so communication stays consistent and purposeful. Each month aligns with nationally recognized themes and timely topics. This helps normalize conversations around mental health and well-being. Topics range from mental fitness and financial stress to inclusion and suicide prevention. In addition to the digital assets that accompany each month's topic, there are also quarterly webinars related to a topic from one of the months in the quarter. This approach keeps the program visible year-round and not just during moments of crisis. We also provide supplemental materials for specific populations or initiatives.

Our work/life team provides quarterly webinars as well. These are designed to provide practical, accessible support for everyday challenges and are highly relevant and easy to access. They are available on demand. They cover real-life topics employees are actively dealing with such as stress,

finances, work-life balance, and inclusion. They are offered via a mix of modalities to meet different learning preferences. These sessions provide actionable tools — not just theory. They're also a great way to continuously re-engage your employees throughout the year.

Everything is designed to be easy to deploy and aligned with OCBE's mission and values.

**4.6** *Is communication and support available in languages other than English? If yes, list languages available.*

*Response:*

Carelon is proud of our commitment to cultural competency and diversity within our workforce as well as in the services that we deliver. We integrate cultural-linguistic competency into programs, services, policies, and processes that reflect an understanding and respect for the diverse cultural and linguistic needs of members, providers, clients, staff members, and stakeholders in the provision of our services. This includes individuals who have disabilities; limited English proficiency; disparately impacted populations such as LGBTQ+, BIPOC, refugees, and immigrants; and individuals who have diverse cultural, racial, ethnic, religious, or spiritual backgrounds. We ensure that members receive equitable and effective care and services based on health equity and literacy factors and in a culturally and linguistically appropriate manner.

**Resources Readily Available in Multiple Languages**

Carelon uses the Language Line Services language line, which provides live translations in more than 200 languages and variants. Carelon ensures non-English speakers receive services in a culturally sensitive and competent manner, such as by printing member information in Spanish as well as including a translation card with documents sent to members. The card has instructions in multiple languages on how to contact Carelon for help with understanding the documents.

Please see **Attachment 1 - Carelon Languages Available to Members.pdf** for a complete list of our available languages.

Carelon will continue to collaborate with the Oldham County Board of Education to create member materials that meet all needs and state-specific requirements.

**4.7** *Describe the dedicated point of contact or account manager your company provides for OCBE as the employer. How quickly can OCBE administrators expect a response when reaching out?*

*Response:*

As the current Oldham County Board of Education EAP provider, you will maintain your relationship with your current Account Executive, Sara Pleiman, as a single point of contact for any issues or operational questions. Sara will continue to work with you to discuss potential strategies, agree on a shared path, and implement the strategies agreed upon.

Your Account Executive will respond to inquiries within one business day; they are typically able to respond to client concerns immediately. The account team will always provide a telephone number, email address, or other means of receiving backup assistance when you need services. In addition, the toll-free hotline will be available 24 hours a day, seven days a week for the emergency needs of your members.

**4.8 How do you measure and report on employee utilization and satisfaction? How often are these reports provided to OCBE?**

**Response:**

The EAP reporting package provides comprehensive, actionable insights across utilization, clinical outcomes, workforce impact, and service engagement. Standard reporting includes overall program utilization metrics such as eligible population, total and annualized utilization rates, and month-over-month trends. Detailed case reporting captures total distinct cases, case-based utilization, and geographic distribution.

Participant demographics are analyzed, including gender, age, participant type (employee, dependent, spouse), and new versus returning users. Clinical reporting includes presenting and assessing concerns, with visibility into top issues such as stress, anxiety, depression, and work-related challenges, as well as substance use trends. Case disposition outcomes are tracked, including resolution within the EAP and referrals to external resources.

Access and referral metrics provide insight into how members engage with services, including access channels (phone, online, onsite), referral sources, and how members learned about the program. Clinical outcome reporting measures impact through assessments of job performance, productivity, absenteeism, and overall functioning, as well as validated improvement metrics comparing baseline to follow-up across mental health and workplace indicators.

The reporting package also includes vendor interface data, tracking inbound and outbound referrals and key partner activity. Organizational services reporting captures employer-facing support, including management consultations, training, critical incident response, total contacts, participation levels, and service trends over time.

Expanded reporting covers work-life services utilization, including case activity, resource usage, and resolution outcomes across domains such as family care, financial needs, and social determinants of health. Legal and financial service utilization is reported with case volumes, web engagement, and top presenting issues.

Digital engagement metrics are included for the wellbeing platform, such as total users, sessions, page views, average daily usage, and most accessed content, along with trend analysis over time.

Together, these metrics provide a holistic view of program utilization, member needs, clinical effectiveness, and organizational impact, enabling data-driven decision-making and continuous program optimization.

These reports are provided to you by your account executive on a quarterly basis. They will review all the results and discuss any issues or concerns.

**SECTION 5 — REFERENCES**

	<b>Reference 1</b>	<b>Reference 2</b>	<b>Reference 3</b>
<i>Organization</i>	BCBS Rhode Island	The Standard	Tenet Healthcare – terminated client
<i>Contact Name &amp; Title</i>	Stephanie Santoro, Manager, Specialty Products and Services	Natalie Barenthin, Market and Customer Insights Manager	Betsy Harrison, Manager of Benefits
<i>Phone / Email</i>	401-459-5745 <a href="mailto:Stephanie.Santoro@bcbsri.org">Stephanie.Santoro@bcbsri.org</a>	626-356-1026 <a href="mailto:Natalie.barenthin@standard.com">Natalie.barenthin@standard.com</a>	469-893-6962 <a href="mailto:Betsy.harrison@tenethealth.com">Betsy.harrison@tenethealth.com</a>
<i>Services Provided</i>	EAP Program	EAP Program	EAP Program
<i>Length of Relationship</i>	6 years	1 year	7 years

**SECTION 6 — CERTIFICATION & SIGNATURE**

*By signing below, the authorized representative certifies that all information is accurate, the proposal is valid for 90 days from submission, and the company agrees to comply with all terms of RFP #2026-04, including KRS 424, Board Policy 03.23251, KRS 45A, and all applicable federal laws.*



Tina McBreen/4 p.m.

4/30/26

Signature

Name/Time

Date

# ATTACHMENT A - RFP TIMELINE AND PROPOSAL SUBMISSION CHECKLIST

- **TIMELINE**
  - Request for RFP Distributed April 8, 2026
  - Questions and Clarification Deadline April 24, 2026
  - Bids Due May 5, 2026 by 12:00p.m. EST
  
- **PROPOSAL SUBMISSION CHECKLIST**

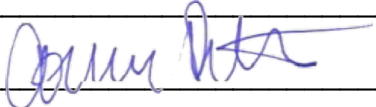
The vendor **MUST** include the following with the proposal submission. If the items below are not submitted with the proposal submission, the District will deem the proposal non-responsive and **SHALL NOT** consider for award.

All other items **MUST** be submitted prior to award.

- ATTACHMENT A - PROPOSAL SUBMISSION CHECKLIST (THIS ATTACHMENT) – COMPLETED AND SIGNED
- ATTACHMENT B - PLEDGE OF NON-DISCRIMINATION
- ATTACHMENT C - VENDOR PROPOSAL RESPONSE TEMPLATE
- SUBMITTED PRIOR TO THE CLOSING DATE AND TIME

Company Name: Carelon Behavioral Health, Inc.

Business Address of Bidder: 200 State Street – Boston, MA 02109

Authorized Signature / Title:  Corbin Petro, President

Primary Contact Name & Title: Sara Pleiman – Account Executive

Phone Number & Email: [Sara.Pleiman@carelon.com](mailto:Sara.Pleiman@carelon.com), 567-644-2968

Year Established/# of Employees: 1987 – 2,100

Submission Date/Time: May 5, 2026 – 12 p.m. EST

## ATTACHMENT B - PLEDGE OF NON-DISCRIMINATION

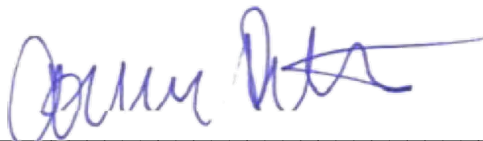
Carelon Behavioral Health, Inc. \_\_\_\_\_, is responding to RFP/BID # 2026-04  
Insert Name of Company (hereinafter "Company")  
issued by the Board of Education of Oldham County, Kentucky, and hereby  
pledges:

(1) No person shall be excluded from participation in, denied the benefit of, or otherwise discriminated against on the basis of race, color, national origin, sex, genetic information, disability, religion, age, political affiliation, sexual orientation or gender identity in connection with the performance of any contract award by the district on this RFP/BID.

(2) The Company shall provide equal opportunity to all business persons seeking to contract or otherwise interested in contracting with this Company, including various local small business enterprises;

(3) The Company has been made aware of, understands and agrees to make good faith efforts to solicit MBE/WBEs to do business with this Company in the performance of work on any contract awarded on this RFP/BID.

The Company acknowledges that failure to make a good faith effort may have a negative impact on future contract opportunities.



\_\_\_\_\_  
(Authorized Company Representative Signature)

April 27, 2026

\_\_\_\_\_  
Date

Corbin Petro, President

\_\_\_\_\_  
Print Name and Title