

West Virginia Department of Environment

Employee Assistance Program
Request for Quotation
RFQ# CRFQ 0313 DEP 1700000026

Proposal Submitted: June14, 2017

Prepared for:

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Purchasing Division
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Prepared by:

KEPRO
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June 13, 2017

Jessica Chambers
Department of Administration and Purchasing Division
2019 Washington Street, East
Charleston, WV 25305

Letter of Transmittal
Administration of the Employee Assistance Program
RFQ CRFQ 0313 DEP 1700000026

Dear Ms. Chambers and Selection Committee Members:

Keystone Acquisitions, Inc. (KEPRO) is pleased to provide the accompanying proposal for a comprehensive employee assistance program for the West Virginia Department of Environmental Protection as outlined in your request for quotation.

KEPRO has a long history of partnering with state, county and municipal governments to assist their employees and family members to receive the assistance and support they need to effectively manage personal and work concerns before quality of life is adversely impacted. Our programs are designed to provide early intervention in addressing a wide variety of problems that can impact an individual's ability to enjoy a productive and satisfying life. In addition to our over 25 years of experience within the Employee Assistance field, KEPRO, through our legacy company APS Healthcare, has a long history in working with the State of West Virginia in providing support to your most needy state residents for over 15 years.

Employee Assistance Programs can provide tremendous value to the organizations that implement and maintain them but only when individuals take advantage of the services, resources and support available. KEPRO has the experience and a track record of performance in designing, implementing, and delivering programs that are highly visible within the organizations we serve to encourage utilization. We are confident that we can engage your employees and assist the Department of Environmental Protection in creating a culture that supports self-care and success in all areas of life.

Our core values of - Intelligent, Holistic, Compassionate, Personalized, Valuable, and Clinical - drive all that we do.

- We are committed to utilizing innovative approaches in the delivery of services.
- We believe that the wellbeing of the whole person is critical to their personal and professional success.
- We are passionate about creating positive outcomes for your employees.
- We are committed to taking the time to understand your unique organization and needs and then customize our programs and services to meet those needs.
- We drive ourselves to deliver value and a return on investment not only the investment that the Department will make in providing this program but also the investment that each employee / family member will make when they access our services.



We are founded on the principle of clinical expertise and have decades of clinical experience and incorporate and operationalize that expertise and experience in all that we do.

Should you have any questions related to this proposal, please do not hesitate to contact me at:

Susan Baker, Vice President of Operations Telephone Number: 800-305-3720 ext. 4825

Fax Number: 800-480-8341

E-Mail Address:smbaker@kepro.com Address: 6085 Marshalee Drive, Suite 110

Elkridge, MD 20145

Please accept the following proposal and rates as KEPRO's proposal for a comprehensive Employee Assistance Program. I believe you will experience KEPRO as a company that is committed to a process of active partnership and dialogue with our clients. We look forward to the opportunity to learn more about your specific needs and assist you in achieving your goals.

Sincerely,

Susan Baker Vice President, Operations



SECTION 3.0: QUALIFICATIONS

3.1 Vendor must have provided services similar to those requested in this solicitation to a minimum of three entities within the last five years. Vendors should include documentation supporting this requirement with their bid.

Founded in 1985 as a national specialty health care company, KEPRO and our legacy companies have been providing Employee Assistance Programs (EAP) for over 25 years and integrated wellness and disease management services as well as behavioral health utilization and case management for 15 years. Across the United States, KEPRO successfully serves more than 10 million lives providing a comprehensive and integrated spectrum of uniquely structured programs including employee assistance, wellness, disease management, utilization management, case management, behavioral health and mental health/substance abuse services. From an EAP perspective, we currently deliver EAP services to over 200 customers and cover approximately one million lives across the United States and Puerto Rico. Our client-base includes state and county governments, municipalities, corporate employers, Taft-Hartley Trust Funds, health plans, and university systems.

One of our primary strengths is our ability to collaborate with our customers as well as our vendor partners in customizing and delivering successful EAP and Worklife services. Our success is based on a commitment to understanding the unique organizational culture and needs of each customer. This allows for the delivery of a customized program and service delivery approach that reinforces the goal to establish the EAP as a trusted resource for individuals, departments, agencies, administrative and support services, and the organization as a whole. Our experience has allowed KEPRO to customize consultation and interventions related to human behavior and optimize performance in the work environment for our customers.

Company Size. KEPRO employs over 900 FTE health professionals and our current provider roster includes more than 6,000 EAP providers, 3,500 physician and non-physician reviewers encompassing 104 specialties from behavioral health and family medicine to therapeutics. Our EAP supports more than 200 EAP and Worklife customers, which represent approximately 1 million lives, across the United States (US) and Puerto Rico (PR). We have a history of serving employers of varying sizes and currently provide EAP services to city and county governments, school districts, universities, and numerous private employers.

Capabilities. KEPRO is the industry expert in population health management, employee assistance programs, absence management, independent review, utilization management; chronic care management, disease management, waiver management, quality management, wellness, information technology (IT) development and data analytics are among our core offerings. The integration of our clinical resources, proprietary Total Population Health Services software, and our collaborative approach,



results in improved medical and behavioral health outcomes and significant cost containment for our clients.

Our EAP is rooted in EAP core technology and in spite of many enhancements in terms of services; we never lose sight of the primary objective of providing the workplace and its employees with the tools and resources to positively impact personal concerns that are impacting job performance and personal well-being. With each account, we work with our key contacts to tailor a program that meets their unique situation and needs. We provide a range of session models from 3 to 10 sessions per issue and maintain a network of counselors throughout the country that provide in-person counseling. By utilizing network clinicians who maintain private practice offices, we are able to offer the employee/member convenience in terms of location and scheduling as well as choice.

We operate our own call center staffed by KEPRO employees where members can expect to reach a qualified masters level clinician 24/7. Our highly skilled staff, each with multiple years of industry experience and time with KEPRO, never lose sight of how hard it can be to make that initial call for service. We take the time to listen, thoroughly assess, and provide referrals as needed to network providers and other resources both within and outside the EAP. Whenever necessary we assist with appointment setting. For most groups, our program includes a wide range of worklife services such as child and elder care consultation, legal and financial consultation, and website resources. In addition there is unlimited access to our specialized team of workplace consultants to assist HR and management with consultation and guidance when personal concerns impact an employee's ability to be productive in the workplace.

KEPRO has the people, experience, technologies, analytic capabilities, and processes in place to deliver a high quality product and service to the Department, which will in turn, achieve significant results. Together we represent a best in class EAP program, as evidenced by our many references from current, similar clients that we collaborate with on numerous major projects.

Industry Experience. KEPRO has extensive experience serving the EAP needs of state, county and municipal governments. We have actively partnered with government entities to address a wide range of common concerns such as dealing with the deaths of employees, burn out among workers on the front line of serving children and families in crisis, high conflict and communication challenges, downsizing, and a range of critical incidents impacting the workforce that vary from workplace accidents to natural disasters.

KEPRO has capitalized on its experience in behavior change to create EAP, mental healthcare and physical programs that are industry renowned. The use of an integrated approach to healthcare for the mind and body has allowed us to be more effective in improving the quality and effectiveness of our services and care for our participants.

We believe we are well positioned to deliver a quality, responsive and comprehensive employee assistance program to the Department of Environmental Protection given our:



- Experience in the EAP field,
- History of responsive service to state and regional governments nationwide,
- Demonstrated commitment to close collaboration with the customers we serve.
- Our ability to respond to the entire spectrum of routine and crisis situations.
- Our high level of program satisfaction based on our 2016 participant satisfaction survey, over 98% of respondents were satisfied with our program and would recommend it to others, and
- Our ability to achieve positive outcomes with 93 to 96% of participants indicating that our services helped them manage problems better, improve their relationships and function better at work.

KEPRO is positioned to provide EAP services throughout all 50 states and has the depth of resources including highly experienced staff to perform the proposed services. We are committed to innovation and service excellence and have twice received the EAP Digest/EAPA Quality award for EAP excellence. We are dedicated to exceeding your expectations related to program launch and on-going service delivery throughout the life of our relationship.

3.2 Vendor's clinical staff shall include, at a minimum, Six (6) trained Psychologists in the following areas: Family Counseling, Child Counseling, Adult Counseling, Seniors Counseling, Adolescent Counseling, and Psychological Testing. Clinical staff shall be available throughout the State of West Virginia.

KEPRO will be able to provide the West Virginia Department of Environment (DEP) with a minimum of six trained clinicians in the areas of Family Counseling, Child Counseling, Adult Counseling, Senior Counseling, Adolescent Counseling and Psychological Testing. We will provide access to care via clinicians throughout the State of West Virginia. We also offers a national network of more than 6,000 multi-cultural clinicians which will ensure that we are able to accommodate the needs of your employees and their dependents.

3.3 Vendor shall provide the following program services: Policy and Procedures Review, Orientation and Training, Ongoing Management Consultations, Employee Communications Program, Personal Education Workshops, Personal Consultation Service, Screened and Monitored Referral Services, Case Management Services, Critical Incident Intervention, Management Issues Clarification, Work-life Resource Program Counselors, Wellness, Reporting and Crisis Management, Telephone/Callin Counseling (Toll Free Number) accessible 24 hours per day-7 days per week, and On-site Group Intervention (8 Sessions in selected locations throughout the State of WV).



As a part of our proposal, KEPRO agrees to provide the DEP with the following:

- A review of your EAP Policy and Procedures;
- Orientations and trainings to your leadership teams and their employees;
- Ongoing and unlimited Management Consultations with our dedicated team of Workplace Specialists;
- A robust Employee Communications Program;
- Personal Educational Workshops that will address alcohol/drug awareness, parenting skills, stress management, interpersonal communications, personal budgeting, the relationship between positive mental health and physical health, adapting to change (both on and off the job), dual career families, and etc.;
- Referrals that are screened and monitored by our EAP Affiliate Clinicians;
- Ongoing Case Management Services for Formal and Mandatory Referrals;
- Onsite Critical Incident Support;
- Management Issues Clarification;
- Access to a robust Worklife Referral Resource Program:
- Online access to Wellness Resources;
- Reporting and Crisis Management;
- 27/7/365 access to services via a designated toll-free number; and
- As needed, access to on-site group intervention.



SECTION 4.0: MANDATORY REQUIREMENTS

- 4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.
 - 4.1.1 Policy and Procedure Review: The vendor will assist in the review of existing policies and procedures regarding chemical dependency and other personal problems that affect employee performance, while working with the appropriate agency personnel. The vendor will perform a thorough analysis of mental health and substance abuse coverage accorded employees and dependents via existing group health plans.
 - 4.1.1.1 The vendor will create an Employee Assistance Program Policy and Procedure that will serve as a base for EAP activity.

KEPRO has extensive an extensive history of partnering with our customers to review existing or develop new EAP Policies and Procedures. Upon contract award, KEPRO will work with the West Virginia Department of Environment (DEP) to review your existing EAP policies and procedures regarding chemical dependency and other issues that impact employee performance to ensure that they are meeting your needs. We will also work with the DEP to examine the mental health and substance abuse coverage available through your existing Behavioral Health Plans and how the EAP can utilize this benefit to support your employees.

4.1.1.2 The policy and procedure shall clearly state the procedural actions required to assure optimal program implementation as well as the interface between the EAP and other employee programs and benefits.

During our review process, we will ensure that the DEP's policy and procedure clearly identities the procedural actions required for implementation. We will also make sure that interface between the EAP and other employee benefits/programs are clearly identified.

4.1.1.3 This policy and procedure will be developed within 90 days of the contract award.

KEPRO agrees to develop the EAP Policy and Procedure within 90 days of contract award.



4.1.2 Orientation and Training: The vendor will provide orientation and training programs for all management personnel within DEP, to maximize program effectiveness.

KEPRO's leadership trainings for supervisors and managers introduce the EAP; explain our management consultation services and how to appropriately refer troubled employees early on and in accordance with your policies and procedures. Leadership training topics include:

- Overview of EAP Services:
- Leadership Consultation;
- Effective Supervisory Skills;
- Performance Counseling;
- Common Issues Addressed by EAP:
- Self-Referral Process;
- Confidentiality:
- Preventions and Early Intervention;

- Warning Signs
- Barriers to Effective Communication;
- Conflict Management;
- Documentation:
- Steps for a Constructive Discussion;
- Follow-up; and
- How to Contact the EAP

Our training services help supervisors quickly recognize employees with job performance issues. At times, an employee's problems may carry over into the workplace. Employees who have relationship issues, depression, substance use and abuse, financial and legal issues, and work-family balance problems can benefit from EAP assistance. Supervisors and managers are educated on EAP services, and how to both identify and appropriately refer employees to the EAP for assistance. We provide managers and supervisors with guidance on the steps to take during a constructive discussion with the employee. Sessions focus on:

- How the supervisor identifies a problem employee;
- The supervisor's role in dealing with an employee;
- Documentation of workplace/employee issues;
- How to refer the employee to the EAP;
- The significance of the EAP to cost containment and employee productivity; and
- Helping supervisors improve employee job performance.

We have a variety of training modalities to match the needs of today's workplace. Understanding that it is not always possible to bring a group of employees together KEPRO can offer training to leadership/supervisors via webinar. In addition, KEPRO can also provide a supervisor manual that provides comprehensive information regarding the EAP, referral process and services available to those in leadership. KEPRO's supervisory training services are designed to complement and reinforce the personnel policies and procedures of DEP.



4.1.2.1 Executive Orientation- Supervisor/Manager Orientation: The vendor will provide multiple one-hour orientation for all management personnel and all employees with supervision as part of their day-to-day role, at locations listed in 4.1.2.2. These sessions will be conducted prior to formal announcement of the program to allow for last minute procedural adjustments and assure support for the program. A schedule for these sessions will be established within 90 days of award of the contract.

KEPRO agrees to provide multiple one hour orientations for all

4.1.2.2 Presentation to all DEP Employees: Orientation/training session for non-supervisory employees shall be conducted at the following DEP locations: Fairmont, Kanawha City, Logan, Oak Hill, Philippi, and Wheeling.

As a part of our proposal, KEPRO will provide orientation/training sessions for all DEP non-supervisory employees at your Fairmont, Kanawha City, Logan, Oak Hill, Philippi, and Wheeling locations.

4.1.3 Ongoing Management Consultations: The vendor will provide consultation for any manager/supervisor considering the referral of an employee to the EAP.

KEPRO provides various services for those in leadership positions including leadership trainings and unlimited telephonic leadership consultations. Our consultants are seasoned clinicians with experience handling management consultations, informal and formal referrals and DOT services.

KEPRO Workplace Specialists help supervisors and managers effectively deal with troubled employees/participants, initiate a supervisory referral, and understand how to maintain positive, productive work environments for their employees. KEPRO can provide guidance and coaching on:

- Identifying problem employees (i.e., outbursts, tardiness, co-worker relationships, missed deadlines, absenteeism, low morale, complaints, etc.);
- How to talk with an employee about work performance rather than focusing on the employee's personal problem;
- How to develop a constructive intervention;
- Documentation of employee work performance issues (i.e., document actions as they occur; be specific; list expected work standards and how they are not being met; outline consequences if performance does not improve, etc.);
- Defining the supervisor's role in the referral process;
- How to utilize the EAP during the referral process;
- Ensuring all appropriate parties are coordinated for management referrals;
- Confidentiality issues.



Additionally, our consultant's possess extensive experience in the facilitation of organizational consultation and intervention. They routinely provide in-depth assessments to our client organizations related to a variety of workplace issues. Based on the assessment, the Workplace Specialist will summarize the findings, develop a customized intervention, and offer recommendations regarding how said interventions may be implemented within the organization. KEPRO has successfully supported organizations in exploring and resolving situations related to violence in the workplace, organizational downsizing/reduction in force, fostering employee morale and engagement, and the enhancement of workplace relationships.

4.1.3.1 The vendor will assist in the "Conflict Resolution" process as needed. This consultation should aide managers and supervisors in dealing with difficult or sensitive problems. The vendor will meet with supervisors and employees to facilitate conflict resolutions, when requested.

As a part of our Management Consultation and Services, KEPRO's Workplace Specialist regularly partner with managers and supervisors on Conflict Resolutions. Our consultations will assist your leadership with dealing with the difficult and sensitive issues that are commonly seen in workplace conflicts. When needed, we have the capacity to place a clinician onsite to meet with supervisors and employees to facilitate conflict resolution.

4.1.3.2 The vendor will provide an orientation program to all new employees either via a video provided the DEP staff or via a personal presentation by vendor staff at quarterly New Employee Orientations.

As a part of proposal, KEPRO will offer quarterly new employee orientations to the DEP. Employee Orientations can be provided in person, or via webinar. KEPRO has included an unlimited number of webinar hours that can be used for Employee Orientations. In addition, DEP has access to a bucket of 15 on-site training hours that could be used for face-to-face trainings.

- 4.1.4 Employee Communications Program: The utilization of the EAP is affected by many variables, such as employee demographics, types of service available, etc. To establish an effective campaign to encourage self-referrals and to keep the program fresh in the minds of all personnel:
 - 4.1.4.1 The vendor will design a communications program based on DEP's unique variables.

With 25+ years of experience in the EAP field, KEPRO has found that the most effective strategy for promoting employee awareness of and ultimately utilization of the program is to tailor our services according to the specific nuances of the customer. We understand that each customer and its worksites are unique in terms of culture, workplace trends and employees' perception of the EAP. As a



result, during implementation, we spend considerable time with each of our customers learning about their unique needs so that we can customize our communication and promotion strategies accordingly.

4.1.4.2 The vendor will provide promotional material geared toward encouraging positive preventative health and early use of EAP services. Among the promotional items anticipated are; home mailings, handouts, brochures, posters and newsletter articles.

In collaboration with DEP, KEPRO proposes to develop and implement a customized, multi-media communications campaign that explains the program, the benefits it has to offer, and how to access services immediately before issues become crises. To ensure program utilization, the communication campaign will consist of both traditional activities (e.g., brochures, posters, newsletter articles, etc.) as well as more innovative promotional activities including online orientations and trainings via our website, EAPHelplink. KEPRO will provide the following communication materials electronically and has the capability to facilitate orientations, trainings, and workshops either in person or via webinar:

- Brochures
- Wallet Cards
- Posters for worksites, fairs, and etc.
- Employee Orientations
- Leadership Trainings

- Tip Sheets
- Educational Trainings/Workshops
- Webinar Trainings/Workshops
- Employee and Supervisory Newsletters
- Website Promotion EAPHelplink

Please note that KEPRO's promotional materials are also available in multiple languages, including Spanish. There are no additional fees for customizing materials unless the customization goes beyond including a logo and program specific telephone number. KEPRO is willing to discuss co-branding communication materials with DEP. During implementation, we will be able to discuss in greater detail the degree to which co-branding may be possible. Our 2017 Promotional Calendar and sample Promotional Materials are attached as Exhibit A.

4.1.4.3 The vendor will carry out at least one communications program directed to all DEP employees per quarter. A plan for the yearly communications will be presented within 90 days of contract award.

KEPRO agrees to provide at least one communications program, directed to all DEP employees, per quarter and will present a yearly communications plan within 90 days of contract award. Our current campaign consists of promoting wellness topics and trainings via monthly tip sheets, posters, and plasma screens. We also provide two quarterly employee and supervisory newsletters.



4.1.5 Personal Education Workshops: The vendor will be available to provide up to two one-hour workshops per year at each of the following locations: Fairmont, Kanawha City, Logan, Oak Hill, Philippi, and Wheeling.

As a part of our proposal, KEPRO is able to provide up to two one hour workshops per year at the DEP's Fairmont, Kanawha City, Logan, Oak Hill, Philippi, and Wheeling locations.

4.1.5.1 The designated EAP Coordinator and the Vendor will jointly determine subject matter.

KEPRO agrees coordinate personal education workshop training content with the DEP's designated EAP Coordinator.

4.1.5.2 Examples of workshops the vendor will provide, shall include alcohol/drug awareness, parenting skills, stress management, interpersonal communications, personal budgeting, the relationship between positive mental health and physical health, adapting to change (both on and off the job), dual career families, etc.

KEPRO maintains a database of over 90 training topics and delivers trainings directly and via our locally based EAP Affiliate Clinician network and our strategic partner. We have an extensive training catalogue including content on Parenting, Personal Development, Professional Development, Wellness, Aging, Legal/Financial, People Management, Employee Assistance and Worklife to mention a few. We also feature a wide range of web based training including: live monthly webinars, webinars on demand and Skill Builder training modules.

Training curriculum is developed by a team of individuals with various backgrounds and knowledge related to behavioral health, worklife, people management, professional and personal development topics. Our curriculum philosophy is to create training sessions that are solution-focused and allow participants the opportunity to understand key content elements, assess their behaviors and leave with practical strategies to guide future actions. For topics that include content of a sensitive nature, the focus is to de-stigmatize any issues and present content that is relevant to personal experience, and safe for participants.

In addition to our content expertise, what is unique to the success of our curriculum design is our knowledge and inclusion of adult education principles. This blend of content and learning styles allows us to develop curriculum that is presented in variable learning formats to engage the audience and enhance the learning experience.



Some of our more popular training topics include:

- Parenting
- Personal Development
- Professional Development
- Wellness
- Aging
- Legal/Financial
- People Management
- Employee Assistance and Worklife

Promotion for these topics is accomplished via monthly tip sheets, posters, plasma screens, and quarterly newsletters.

As a part our proposal, we have included a training hours in the contracted rate to support our participation in work site events including: wellness trainings, Brown Bag Lunches Health / Benefit Fairs, EAP Orientations, and Manager Orientations. A sample of our 2017 Training Catalog is attached as Exhibit B.

4.1.5.3 The vendor's seminars should help employees improve various life skills, but establish a relationship of trust in the EAP staff which encourages employees to seek earlier consultation for emerging personal concerns. They should form a critical element in a preventative Employee Assistance Program.

KEPRO understands that, for many employees, attending a seminar or lunch and learn may be their first exposure to the EAP. As a result, our training curriculum is developed by a team of individuals with various backgrounds and knowledge related to behavioral health, worklife, people management, professional and personal development topics. Our curriculum philosophy is to create training sessions that are solution-focused and allow participants the opportunity to understand key content elements, assess their behaviors and leave with practical strategies to guide future actions. For topics that include content of a sensitive nature, the focus is to de-stigmatize any issues and present content that is relevant to personal experience, and safe for participants.

Our trainings result in employees proactively reaching out to the EAP for consultation when they have emerging personal problems. The preventative use of the EAP often times resolves the issues and prevents them from having a negative impact on their performance or the workplace.

4.1.6 Personal Consultation Services:

4.1.6.1 The vendor shall provide professional, experienced counselors to make an accurate diagnosis of an employee's problem.

KEPRO assures DEP a network of credentialed, trained and licensed providers through our recruiting/credentialing, re-credentialing and initial and going training



and monitoring. KEPRO follows the National Committee for Quality Assurance (NCQA) Credentialing Guidelines and verifies EAP Affiliate Clinicians' credentials through the following screening tools during different phases of the credentialing process, which we believe differentiates our services among our competitors:

- **EAP Affiliate Clinician Pre-Screening Tool** This tool helps us ascertain whether an affiliate meets standard for credentialing.
- **EAP Affiliate Clinician Interview Tool** This tool is utilized to assess his/her range of skill in responding to complex workplace situations when evaluating a clinician for an on-site EAP role.

In addition to our EAP specific criteria above, our affiliates must also meet our general credentialing criteria for individual clinicians, which may vary depending on federal/state regulations and standards for specific disciplines below:

- Minimum of one year of full time experience at an accredited substance abuse/chemical dependency treatment program, agency or facility; or
- Minimum of one-year clinically supervised full-time work experience under a Master's-level or higher, licensed certified addictions counselor or a MD. Attestation of supervision is required; or
- Licensure/certification as an addictions counselor at either the state or national level; and
- Meets KEPRO general qualifying criteria in addition to criteria for specific discipline; and
- Certification as an Employee Assistance Professional (CEAP) or minimum of two years of EAP experience preferred.

In addition to our EAP specific criteria above, our affiliates must also meet our general credentialing criteria for individual clinicians, which may vary depending on federal/state regulations and standards for specific disciplines below.

Standard	Verification
Active professional license(s) to practice as an independent behavioral healthcare clinician at the highest level certified or approved by the state	Orally or in writing from the appropriate state licensing board, or directly via state board Internet websites
Professional Liability (\$1,000,000/\$3,000,000)	A current copy of Malpractice Face Sheet
Sanctions against Licensure	Query of the National Practitioner Data Bank and the State Licensing Board
Professional liability claims history	Query of the National Practitioner Data Bank
Residency/professional programs and school attendance and graduation	Verified orally or in writing from the institution



Standard	Verification
Medicare/Medicaid sanctions: Exclusion from participation in Medicare, Medicaid and other Federal health care programs and from government contracts	Query of the National Practitioner Data Bank, Office of the Inspector General (OIG) and General Services Administration (GSA)

4.1.6.1.1 Thus, it is anticipated that seventy percent (70%) of the individuals seeking counseling will not require referral to community resources.

KEPRO is pleased to share our resolution and referral rates for our book of business and eight session visit models:

	Resolved within the EAP	Requiring a Referral
Book of Business	86.9%	13.1%
Eight Visit Model	91.1%	8.9%

4.1.6.2 The vendor shall provide consultation by appointment, both days and evening, in response to emergency requests for management referral.

KEPRO will provide DEP employees and their family members access to EAP services 24/7/365 days a year via a designated toll-free telephone number. Participants will be able to receive comprehensive assessments; emergency triage; EAP referrals/appointment scheduling for routine, urgent and emergent concerns; telephonic consultation/counseling; and follow-up services from Master's-level clinicians when it is convenient for them, regardless of time of day or day of the week

4.1.6.3 The vendor shall establish the limits of confidentiality, per the Policy and Procedure Review and development process noted earlier. These are to be fully explained to all employees prior to program participation.

Before beginning their comprehensive assessment, KEPRO's EAP Consultants educate all participants on the limitations to confidentiality. Once the consultant has obtained verbal acknowledgement, they will initiate the telephonic assessment and will document in the members' case file that they understand that their decision to participate is voluntary and the limits of confidentiality.

When a member connects to an EAP Affiliate Clinician for face-to-face counseling sessions, the counselor reminds members that their decision to accept assistance is voluntary. Additionally, affiliate counselors review confidentially and the scope of EAP services with every member before initiating counseling sessions.



4.1.6.3.1 It is anticipated that up to ten percent (10%) of all employees will utilize the EAP.

KEPRO is agreeable to working with the DEP toward meeting your identified utilization rate. The average utilization rate of our eight visit model customers is 5.1%

4.1.6.3.2 It is also anticipated that ninety percent (90%) of the employees using the EAP will do so on a self-referral basis and ten percent (10%) will use the program at the request of a supervisor. The actual ratio achieved will depend on the EAP policies and procedures established by the agency.

From KEPRO's experience, 86.5% of referrals are on a self-referral basis and 13.5% are management referrals.

4.1.6.3.3 It is established that seventy to seventy-five percent (70-75%) of the employees seeking help can be assisted by the EAP with no out-of-pocket expense or use of group health benefits. Short-term counseling usually involves four to eight sessions spread over a two three-month period.

KEPRO agrees with the DEP's established 70-75% of employees will be assisted by the EAP and that there will not be any out-of-pocket expense or use of group health benefits. From our experience, 91.1% of participants using our services are able to resolve their concerns within the EAP and do not need a referral for ongoing care.

- 4.1.6.4 Vendor will provide for Short-term counseling.
 - 4.1.6.4.1 Short-Term counseling is a highly focused, goal-directed counseling that encourages the client in more responsible decision making and improved interpersonal skills.

KEPRO agrees that short-term counseling is a highly focused, goal-directed counseling technique that encourages participants to make more responsible decision making and that will lead to improved interpersonal skills. Our EAP Affiliate Clinicians are seasoned EAP clinicians who skillfully use the first one to two sessions to complete a compressive assessment of a participants presenting problem(s). As a part of their assessment, the affiliate will determine if the participant's issues are appropriate for short-term counseling. If the issues are appropriate for short-term counseling, the affiliate will use the remaining sessions and provide solution-focused brief counseling to assist the participant in resolution.



4.1.6.4.2 Counseling will involve a four-step process including: Problem Clarification, Search for Alternatives, Personal Action Plan Development and Follow-up and Support.

KEPRO agrees that EAP Counseling is a four step process that includes: Problem Clarification; Searching for Alternatives, Developing a Personal Action Plan and Providing Follow-up and Support. As a part of their comprehensive assessment, our EAP Affiliate Clinicians actively work with participants to clarify the issues that bring them in for counseling and to work with them to identity any alternatives and/or resources that may be of assistance. Once the assessment is completed, they will partner with the participant to develop a personal action plan that addresses there needs and will provide all needed follow-up and support.

- 4.1.7 Screened and Monitored Referral Service: For employees with personal problems requiring highly specialized care or hospitalization, vendor counselors will provide referral to screened and monitored treatment resources if necessary.
 - 4.1.7.1 Vendor shall use extreme care to assure objectivity in the referral process. Consideration will be given not only to the assessed problem but also the location, fees and third-party coverage.

KEPRO's EAP Affiliate Clinicians always use extreme care and objectivity when assisting participants with referrals. If a participant is need of a referral, they will work with them to identify the most appropriate referral via community resources or their behavioral health plan. If needed or required, the clinician will assist the participant with securing any preauthorization of care. Our clinicians will also make every effort to advise participants on the costs associated with care beyond the EAP.

4.1.7.2 The final choice of a referral resource is always made by the employee, except in certain life-threatening situations.

KEPRO agrees that the final choice of selecting and/or connecting to a referral resource, except in life-threatening situations, is up to the employee. If a participant is resistant to connecting to a referral resource, our EAP Affiliate Clinicians will remaining sessions to work with them on treatment readiness.

4.1.7.3 The employee approves the release of information in order that the EAP counselor and referral resource may exchange information relevant to the case.

KEPRO strongly encourages our EAP Affiliate Clinicians to have participants sign releases of information. Not only does this allow for



communication between the clinician, but it also provides the participant with a seamless transition of care.

4.1.7.4 Fees for professional services rendered by resources other than the EAP will be the responsibility of the employee and/or his or her group medical insurance.

KEPRO agrees that fees for professional services rendered by resources other than the EAP will be the responsibility of the participant and/or their group medical insurance. Our consultants and affiliate clinicians will make every effort to advise participant of the cost associated with care rendered outside of the EAP.

4.1.8 Case Management Services: In the case of a "mandatory referred" employee, the vendor will remain in regular contact with the referring personnel to assure consistency in management practice and to encourage follow through on the part of the employee.

As a part of our proposal, KEPRO provides unlimited management consultations and formal/mandatory referrals. During the referral process, our workplace specialist remain in regular contact with the referring manager or supervisor to update them on attendance, participation, and compliance with the referral. This ensures consistency and encourages employees to follow through with the referral and any recommendations.

4.1.9 Work-life Resource Program Counselors: This service is to provide 24-houra-day, seven-days-a-week telephonic access to counselors who do the leg work for members, locating child care, home health care, assisted living facilities, schools, colleges, health clubs and pet services.

We have a long history of innovation and service within the EAP/Worklife industry to deliver these benefits. Our Worklife consultation, resource, and referral service provides practical assistance to users around a wide variety of dependent care issues. The strength of our service begins with the knowledge and expertise of our specialists, whose role is to assess, clarify, educate, and serve. Our resource and referral process is not divided between intake and research functions. Worklife Specialists are also our research staff—a model that we believe improves the quality of both the consultation and the actual referral. All referrals are qualified and matched to the specific needs and requirements of the user—100% of the time.

At the core of our Worklife consultation, resource, and referral service is the understanding that participant concerns do not always fall into clear service categories. Our Worklife Specialists can search for a variety of options that best fit each caller's needs. Key program features include:



- 24/7 live, immediate access to expert Worklife Specialists via the EAP toll-free phone
- Rapid turnaround time DEP participants will receive their customized referrals within 12 business hours for regular cases or within six business hours for urgent cases
- Educational materials to support each customized consultation, including tip sheets, checklists, handbooks, and brochures (within the US select resources are available in Spanish)
- A customizable website featuring more than 8,000 articles/resources
- Legal and financial services

The resource and referral services offered go well beyond simply locating available providers in a participant's area. The assisted search process begins with a thorough consultation and assessment by a Worklife Specialist. This assessment is used to ascertain a clear understanding of all aspects of a participant's specific request. Our specialists take the time to truly understand the specifics of each case and assist the caller throughout the process. During the initial consultation, the Worklife Specialist will offer suggestions and ideas for consideration when and where appropriate. He or she will also answer the participant's questions. Our specialists commonly provide guidance about topics such as the difference between various care options (e.g., day care centers vs. family day care homes or assisted living facilities vs. nursing homes), the most cost-effective options, and how to evaluate providers.

Areas covered for consultation, resource, and referrals include (but are not limited to):

- Family Day Care Homes and Group Homes
- Emergency and Back Up Care
- Care for Mildly III Children
- In-home care for children
- Summer Camps
- Before/After School Programs
- Pregnancy and Infertility
- Adoption
- Educational services (i.e., nursery and/or preschools, high schools, college planning, etc.)
- In-home and inpatient services (nursing homes, respite care, intermediate care facilities, assisted living facilities, ambulatory facilities, etc.)
- Senior health and other types of medical services for seniors (geriatric specialists, rehabilitation services, screening clinics)
- Paying for eldercare services
- Home-based services (nutrition, Meals on Wheels, cleaning/repair)
- Housing (i.e. retirement communities, subsidized housing, etc.)
- Transportation services
- Older adult support services (i.e., adult day care, volunteer opportunities, support/advocacy groups, and senior citizens center)



Child Care Resource and Referral

Our child care specialists can search for a variety of options that best fit each caller's needs for care. During the initial intake process the specialist obtains all demographic and search criteria. A child care specialist then searches our database for options requested by the parent or suggests additional resources that best meet the parent's needs. Our specialists can offer resources surrounding mildly ill, emergency back-up care; back-up care as a result of school closings from inclement weather to teacher workdays; day, religious, sports or residential summer camps; summer volunteer opportunities for teens; play groups for mothers and their infant/toddler; preschools; Montessori schools; resources on prenatal care from books and a lactation program. Also, a care specialist can search for a variety of special needs resources such as respite care, in-home caregivers, financial guidance, testing and assessment resources, education programs, schools for exceptional children and residential programs. Examples of additional educational resources that we can offer the parents to assist them in their decision making process are: "Choosing Quality Child Care," "How to Handle Conflict with a Provider," "Family Care Checklist," and "Child Center Checklist." Other tip sheets that may be helpful are: "General Information about Disabilities" and "Understanding Learning Disabilities." These are just a few of the many resources we can offer to parents along with their referrals.

Elder Care Resource and Referral

When a participant expresses adult/elder issues to a Worklife Specialist, there are a variety of resources that are offered for assistance. Some examples of searches for caregivers include but are not limited to: caregiver support groups, respite care (in-home or in a facility), state programs that pay a family member to be a caregiver, and domestic organizations including the Area Agency on Aging or organizations specific to a certain disease conditions such as the Alzheimer's Association. Additionally, specialists can research information on specific topics if the caregiver is inquiring about symptoms or the progression of a particular disease. In these types of cases, we include websites, articles, and/or book titles applicable to the request. Also, any applicable literature available through the fulfillment department would be sent to the participant about caregiving.

If the participant is a long-distance caregiver, we offer a similar search to that described above. One exception is that we give the participant the option of locating resources near the participant or near the family member who is in need of the care. An additional suggestion for a long-distance caregiving situation is a geriatric care manager. The care manager can help the dependent maintain a daily schedule and can put the long-distance family member at ease knowing that the dependent is being taken care of by a professional. Any literature items found to be applicable would again be sent to the participant in this type of situation.



Daily Living (Convenience) Resource and Referral

The range of lifestyle issues included under the Daily Living Category is vast. Specialists assist participants with finding care for their pets, and managing their day-to-day responsibilities at home and work.

E	Daily Living and Convenience Services		
1000	Apartment Locators	***	Home Repair (handymen, plumbers, electricians, contractors, etc.)
	Consumer Comparisons		Moving/Relocation Services
-	Chore Services/House Cleaners	-	Pet Obedience Training
888	Emergency Services	100	Pet-sitters/Kennels
-	Entertainment Services		Transportation and Travel Services
	Event Planning	Wii .	Veterinarians
***	Fitness and Wellness Centers/Programs	100	Volunteer Opportunities

The explosion of new adoption choices and the growth of non-traditional families have added to the complexity of the adoption process. Our specialists are trained to educate and support participants as they consider the many options available. Adoption can include dealing with the emotional and financial strains of infertility, in addition to the resources listed below.

Adoption		
Public/Private adoption	Adoption agencies	
International adoption	Adoption attorneys	
Non-traditional adoptions	Adoption advocacy groups	
Step-parent adoption	Adoption support networks	
State adoptions specialist	Searching for birth parents/relatives	
Kinship care resources	 Discussing adoption with children 	
Foster care resources	Post-adoption information	
Financing an adoption	·	

Selecting the best match of educational resources is a challenge to parents and potential students. Participants can consult with the worklife service from early learning programs to colleges, and specialists will help participants explore the educational resources that best meet their needs. Through the educational service, participants will receive information about tutoring resources, public and private schools, programs focusing on children with special needs, and a wide range of developmental issues related to education.

K-12 Education and Schools		
Early learning programs	 Before and after-school programs 	
Nursery schools	Enrichment programs	
Pre-K/Kindergarten Contingency care (mildle emergency back-up care)		



K-12 Education and Schools		
Montessori	International Study Programs	
Public schools	Summer School	
School district profiles	Alternative schools	
School system report cards	Boot camps	
Charter and Magnet schools	At-Risk youth resources	
Private schools	Computer Literacy Programs	
Parochial schools	Special needs education	
Military schools	Volunteer opportunities	
Boarding schools	Non-College options	
Independent schools	Home schooling resources	

	Colleges, Universities and Vocational Schools			
103	Pre-college planning	1002	Residential options	
-	Helping non-college-graduate parents understand college issues	***	Community options	
IM	Junior colleges	300	Tutoring	
M	Community colleges	380	Financial planning	
28	Transfer students	558	Financial aid and scholarship	
dax	Vocational and trade schools		Graduate and post-graduate programs	
85	Colleges and universities		Continuing education	
100	Gender preferences	388	Career development	
-	Specific degree programs		Adult re-entry programs	
188	Admissions testing	300	Life experience credit	
100	Admissions procedures	ME	CLEP credit	
(88)	PSAT preparation	100	Internship resources	
-	SAT preparation		Volunteer opportunities	
um.	Professional preparation (pre-med, law, etc.)	翻	Online/distance learning	

Specialists on the Daily Living Team also provide consultations and referrals on resources related to health and wellness and personal wellbeing. Specialists are also able to locate healthcare providers that meet the participant's medical needs.

Health and Wellness		
Exercise classes	Fitness centers	
Yoga	Sports facilities and classes	
Tai Chi	Health spas	
Healthy cooking	Nutrition	
Relaxation/Meditation	Diet program information	
Dance	Health food stores	
Hospitals and clinics	Weight loss support groups	
Pharmacies	Online resources	
Health screening programs	Walking groups	
Alternative medicine information	Community fitness resources	



Healthcare Providers			
 Allergy and Immunology 	 Obstetrics and Gynecology 		
Anesthesiology	Oncology		
Cardiology	Ophthalmology		
Dermatology	Orthopedics		
Endocrine, Diabetes and Metabolism Specialists	Otolaryngology		
Family Medicine	Pathology		
Gastroenterology	Pediatrics		
General Practice	Physical Medicine and Rehabilitation		
Infectious Disease	Plastic Surgery		
Internal Medicine	Preventative Medicine		
Medical Genetics	Psychiatry		
Nephrology	Radiology		
 Neurological Surgery 	Surgery		
Neurology	Urology		

Relocation/Moving Assistance

KEPRO provides relocation/moving assistance through the Relocation Center on our website. The Relocation Center is an *interactive* program that allows users to "preview" communities across the United States, providing vital statistics and a comparison feature. DEP employees and their family members are able to use the Relocation Center to access up-to-date information including:

- Demographics: Find out more about your neighborhood. In the demographics search participants can find more information local age, income, household (marital status and children), and population
- **Houses of Worship**: Find out more about churches, synagogues, temples or mosques in the area.
- Climate: Find out the highs, lows, average temperature and amount of precipitation in the area.
- Home Sales: Find out about the homes that have sold in the area.
- Local Schools: Identify the best school district for your family.

The Worklife benefits noted above are included in our quoted rate and there is not an additional charge for DEP.

4.1.10 Wellness Services: HRS-Health Risks Assessments-online assessments for employees. The health data collected will be owned by DEP and will be used to determine aggregate health data. DEP and EAP will coordinate assessment contents.



4.1.10.1 EAP website shall include online wellness information in the form of articles, text, videos and local resources on various wellness topics. Onsite training seminars (lunch n' learns) for employees on wellness topics decided upon by DEP and EAP.

EAPHelplink is an *interactive*, web-based life management and resource solution, which provides a wide array of life management tools to help participants deal with behavioral health problems, child and eldercare concerns, and worklife issues in a private and convenient manner. Displayed in a magazine style, users are provided the opportunity for both horizontal and vertical navigation.

Website

The DEP site will have a customized home page which includes items related to benefits in the *News For You* section. Your logo will also be placed at the top of the screen. *Features*, *polls*, *seminars* and *centers* are additional content areas which are also available to be adapted and placed in order of importance to DEP. The customized content you select is made available in both **English** and **Spanish**. Below is a comprehensive listing of the features of EAPHelplink:

- Customizable layout and content options
- Seven content Divisions—Parenting, Aging, Balancing, Thriving, Living, Working, and International
- 61 content Modules—The feature article is updated monthly on each Module page and the homepage
- 513 content Categories
- Eight interactive self-search locators for: child care, elder care, adoption, education (private and public colleges, distance learning, & scholarships), pet sitting, volunteer opportunities, and Certified Financial Planners
- English & Spanish sites available
- 40 financial calculators and planning tools
- 90 streaming audio and 120 video files covering a range of health and emotional health topics
- Monthly, online seminars each with archiving of past seminars
- Over 65 slide shows
- Over 7,000 regularly updated articles
- Reviewed & annotated "best of the Web" resource links
- Medicine Plus medical encyclopedia form the US National Library of Medicine and National Institute of Health
- News for You updated at least monthly and new features option to add customized tabs and resources
- Monthly interactive polls
- Search and Advanced Search features
- Homepage featuring new articles and resources each month
- Special Centers



- ✓ Skill Builder Center 17 E-learning courses that can be completed in 15-20 minutes. Each course provides a visual presentation, brief online quizzes, and a printable certificate of completion.
- ✓ Savings Center A discount shopping program offering up to 25% discounts on name-brand goods and services.
- ✓ Relocation Center An interactive program that allows users to "preview" communities across the United States, providing vital statistics and a comparison feature.
- ✓ Legal & Financial Center Our expert consultants can assist you with a wide range of legal and/or financial questions or concerns. This center also features a wide range of Legal & Financial forms and resources.
- ✓ Optional access to TaxACT TaxACT specializes in tax preparation software and Web-based services.
- Mobile—The website is responsive to the mobile device on which it is viewed (iPhone, iPad, and Android). It "senses" what type of device is being used and adjusts itself for that device.
- The site is updated daily by a team of dedicated staff.

We regularly take a look at the functionality of our website and update to ensure that it is current and meeting the needs of our customers. We can also provide a pass-through link DEP's intranet so that employees within a protected network can immediately access the EAP website without having to log in.

KEPRO would be happy to provide a demonstration of our website. We have also provided access so that you can take a tour of the site. Please visit http://www.eaphelplink.com and enter Company Code: completeweb.

Webinars

KEPRO also offers monthly online webinars via our online platform EAPHelplink. In addition to the monthly webinars, participant have access to archive of past webinars. Some of our recently topics include:

- Compassion Fatigue: Increasing Resiliency
- Creativity 101
- Disrupting Negative Thoughts
- Maintaining Personal and Fiscal Resiliency During Tough Economic Times
- Razing Well-Adjusted Kids
- A Healthier You
- Beating the Blues
- Better Health Through Screening

KEPRO offers access to our monthly webinars through a simple registration process via your EAPHelplink. These topics are promoted monthly via email announcements with flyers and tip sheets. Attached is a copy of our promotional



schedule for 2017, which features the live webinar topics and related promotional publications (See Exhibit A).

Access to EAPHelplink is included as a part of our proposal. DEP employees and their family members will have unlimited access to webinars.

4.1.10.1.1 The EAP website should also include an online tracking tool for employees; personal health information, wellness calculators for exercise, weight management, smoking cessation, etc., and worksite program participation.

KEPRO Wellness, available in both English and Spanish, is an online, interactive wellness and lifestyle management program that engages and empowers your total population. We help members transform poor lifestyle behaviors into healthier choices to reduce risks and improve overall health.

4.1.11 Reporting Quarterly Report: The vendor will provide ongoing analysis of program effectiveness.

KEPRO provides EAP customer reports via our sophisticated MIS system, which affords us a flexible reporting and data analysis environment that extends beyond the typical standard reports. Using database architecture, our system enables us to provide you with accurate utilization reports, presenting both tabular data and graphical summaries of utilization of our services. KEPRO has the capability to provide EAP data trends on a monthly and quarterly basis. During implementation, we will work with you to develop a reporting package that meets your specific needs.

4.1.11.1 Vendor will provide statistical reports that will include the number of persons using the program, types of problems identified, and demographic data.

Our quarterly and annual reports for DEP will address various components of our EAP program including telephone statistics and performance, program utilization such as the number of face-to-face consultations; worklife utilization; follow-up; referrals; participant satisfaction; and web site utilization. We have detailed our standard reporting components below all of which are included in proposed pricing:

Executive Summary:

- Key components of the EAP
- Total number of calls received broken out by type (informational only calls, EAP, community resources and company-sponsored programs)
- Overall utilization summary
- Strategic recommendations/preventative strategies and trends



EAP Case Information and Utilization:

- Demographic information
- Presenting problem
- Primary and secondary assessed issues including a Worklife detail by pathway (number of EAP cases and EAP case outcomes)
- EAPHelplink Utilization

Information on Workplace Promotional Plan Initiatives:

- Employee Orientations
- Management Trainings
- Promotional Materials

Samples of our EAP Utilization Reports are attached as Exhibit C.

4.1.11.2 Vendor shall ensure that all reporting is done in such a way to assure confidentiality.

To ensure confidentiality, KEPRO's quarterly and annual reports only contain "aggregate data" and never contain any information that could identify an employee. Sites with less than 500 employees will be combined to reduce the risk of potentially identifying employees who have accessed EAP services.

4.1.11.3 Vendor shall provide an annual report that will include yearend statistical findings, a review of all programming activities for the year and suggestions for program reinforcement.

Our annual reports for the DEP will summarize the various components of our EAP program including telephone statistics and performance, program utilization such as the number of face-to-face consultations; worklife utilization; follow-up; referrals; participant satisfaction; and web site utilization.

4.1.12 Employee Records: All employee records are considered to be the property of the State of West Virginia.

KEPRO agrees to this requirement. Upon contract award, we will work with our legal team to ensure that we have policies and procedures in place to meet this requirement.

4.1.12.1 Upon termination of this contract, Vendor shall tum over to the agency all employee records, at no cost to the agency.

As a part or our policy and procedure development, we will also make sure that we have a stipulation that allows us to turn over employee records upon termination of the contract.



4.1.12.2 Upon written request by the agency, the vendor shall transfer all records to another vendor, in a safe and secure manner.

As a part or our policy and procedure development, we will also make sure that we have a stipulation for records to be transferred to another vendor, via a secure manner, upon the written request of the DEP.

4.1.12.3 If no transfer is requested, by the agency, within one year, the vendor shall destroy all records in a safe and secure manner, at no cost to the agency.

As a part or our policy and procedure development, we will also make sure that we have a stipulation that allows for the destruction of records, within one year and in a safe manner, if the DEP does not request that they be transferred to another vendor.

4.1.13 Billing: The vendor will bill the agency, in arrears, on a monthly basis.

KEPRO is agreeable to billing the DEP, in the arrears, on a monthly basis for your EAP services.



Purchasing Divison 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

State of West Virginia Request for Quotation 34 - Service - Prof

	Proc Folder: 339746	and the second s	
	Doc Description: Employ		
	Proc Type: Central Contr		Version
Date Issued	Solicitation Closes	Solicitation No	the same and the s
2017-06-05	2017-06-14 13:30:00	CRFQ 0313 DEP1700000026	1

BID RECEIVING LOCATION BID CLERK DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON ST E WV 25305 CHARLESTON US

VENDOR		
Vendor Name, Address and Telephone Nu	mber:	

FOR INFORMATION CONTACT THE BUYER Jessica S Chambers (304) 558-0246

jessica.s.chambers@wv.gov

Signature X
All offers subject to all terms and conditions contained in the solicitation

DATE

6/13/17

Page: 1

FORM ID: WV-PRC-CRFQ-001



Purchasing Divison 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

State of West Virginia Request for Quotation 34 - Service - Prof

	lder:	

Doc Description: Addendum 1- Employee Assistance Services

Proc Type: Central Contract - Fixed Amt

Solicitation No.

Version

Date Issued 2017-06-12 Solicitation Closes 2017-06-14

CRFQ 13:30:00

0313 DEP1700000026

2

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON

WV

25305

US

VENDOR

Vendor Name, Address and Telephone Number:

FOR INFORMATION CONTACT THE BUYER

Jessica S Chambers

(304) 558-0246

jessica.s.chambers@wv.gov

Signature X

All offers subject to a telms and conditions contained withis solicitation

WEEN# 25-1796254

DATE

6/13/17

Page: 1

FORM ID: WV-PRC-CRFQ-001

OITIO			

Addendum

Addendum No.01 issued to publish and distribute the attached information to the vendor community.

The West Virginia Purchasing Division is soliciting bids on behalf of The West Virginia Department of Environmental Protection to establish a contract for the provision of the Employee Assistance Plan (EAP) per the Specifications, and Terms and Conditions as attached.

INVOICE TO		SHIP TO		
ENVIRONMENTAL PROTECTION OFFICE OF ADMINISTRATION		ENVIRONMENTAL PROTECTION 601 57TH ST		
601 57TH ST SE		;		
CHARLESTON WV25304		CHARLESTON WV 25304		
US		us		

Line Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1 Employee Assistance Services	0.00000			
A				and the same of th

Corom Code	Manufacturer	Specification	Model #	
84131609				\$

Extended Description:

Employee Assistance Services

SOLICITATION NUMBER: CRFQ DEP1700000026 Addendum Number: No.01

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

C				
Applicat	ole	A	ddendum Category:	
		Modify bid opening date and time		
Ţ.		1	Modify specifications of product or service being sought	
Į,	1		Attachment of vendor questions and responses	
1			Attachment of pre-bid sign-in sheet	
Į			Correction of error	
[1	Other	
Addend	we	m i: erth	of Modification to Solicitation: ssued to publish and distribute the attached documentation to the vendor community. se technical questions received. anges.	

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

- 1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
- 2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

Technical Questions CRFQ DEP1700000026

Q: How many employees I will be quoting for this RFQ?

A: Approximately 825 employees including spouses and dependents are covered under the current Employee Assistance contract.

ADDENDUM ACKNOWLEDGEMENT FORM SOLICITATION NO.:

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

		Numbers Received:			
(Check th	ne bo	ex next to each addendum	received	1)	
E		Addendum No. 1	[]	Addendum No. 6
]	Addendum No. 2	[].	Addendum No. 7
[•]	Addendum No. 3].	Addendum No. 8
Ĺ].	Addendum No. 4	[]	Addendum No. 9
ſ	1	Addendum No. 5	[]	Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Company

Authorized Signature

6/13/17

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

Revised 6/8/2012

EXHIBIT A
EMPLOYEE ASSITANCE PLAN

ltem	Description	Unit of Measure	Un	it Cost	Qty	250 0	tended Cost
1	Employee Assistance Plan Per Specifications Attached	МО	\$	1.79	12	\$	21.48
				Tota	l Bid	\$	21.48

2017



EMPLOYEE ASSISTANCE PROGRAM

EAP PROMOTIONAL CALENDAR

	Monthly Theme	Monthly Online Seminar* *For clients with Advantage Complete or Enhanced Web	Online Seminar Description — Online seminars found on your page, or you can search for them by title.
JAN	MIND YOUR MONEY Ensuring your financial well-being	Maintaining Personal and Fiscal Resiliency During Tough Economic Times Available on demand starting JAN 17 th	Learn how to develop a "stress plan" to visualize a more positive financial future. Understand the process of prioritizing your needs and exploring the full extent of your assets.
FEB	IGNITE A SPARK Expanding your life through creativity	Creativity 101 Available on demand starting FEB 21st	"Creativity is putting your imagination to work, and it's produced the most extraordinary results in human culture" –Ken Robinson. Learn to tap into your creativity and apply it in all areas of your life.
MAR	ACCENTUATE THE POSITIVE Taking a more mindful approach	Disrupting Negative Thoughts Available on demand starting MAR 21 st	It's not negative thoughts themselves that are the issue; rather, it's when we believe those negative thoughts. Learn how to gain control over negative thoughts and turn them into positive ones.
APR	STAYING POWER Resiliency skills for caregivers	Compassion Fatigue: Increasing Resiliency Available on demand starting APR 18 th	Caregivers often take on the emotions of those they help or rescu After understanding how compassion fatigue can develop, you'll learn specific strategies to reduce stress and to develop resilience
MAY	#HAPPINESS Creating support environments for children	Raising Well-Adjusted Kids Available on demand starting MAY 16 th	Review the current research and science behind raising well-adjusted kids. Learn tips to foster positive mental health in the children and teens in your life.
JUN	GOING THE DISTANCE The path to total well-being	Emotional Support: Staying Balanced in a Changing World Available on demand starting JUN 20 th	Change impacts all aspects of life. Every change brings a chance to self-improve or self-destruct. This session explores how people who know how to manage change have more successful lives.
JUL	MIXOLOGY Celebrating the multigenerational workplace	Managing in a Multigenerational Workplace Available on demand starting JUL 18 th	Identify the characteristics and key motivational factors of each generation. Explore commonalities and discuss differences to build strong teams while bridging the generational gap.
AUG	SAYING GOODBYE Honoring the process of grief and loss	Bereavement: Coping With Loss Available on demand starting AUG 15 th	Grief and loss trigger conflicting emotions. Explore your own reactions to loss, from a death to divorce. Learn why some people are stuck in a "grief rut" as you discuss more healthy ways to griev
SEP	TMI Find your way to the right resources	Information Overload Available on demand starting SEP 19 th	Managing the enormous amount of information that is thrown at us is difficult. Understand what contributes to information overloand apply tips and tools for effectively managing information.
ОСТ	ENERGY BOOST An active approach to well-being	Improve Your Health With Ergonomics and Frequent Movement Available on demand starting OCT 17 th	Sedentary behavior is the fourth leading risk factor of death for people all over the world. Learn to incorporate frequent desk exercises and movement into your day. Additionally, learn proper ergonomic tips to help ease job stress and reduce chronic injury.
NOV	GRATITUDE ADJUSTMENT Appreciating all that is good	The Mind-Body Connection Available on demand starting NOV 21st	Keeping the body relatively calm is crucial to well-being and optim health. Becoming aware of how your body feels when it is under stress is important to maintain a relaxed and calm state.
DEC	FUSION FORWARD Embracing a multicultural	Diversity in the Workplace: Maintaining an Inclusive Environment	Each member of the workforce brings unique skills, background, and experience vital to the successful organization. A diverse workforce is a rich source of creativity and problem-solving.

CALL OR GO ONLINE

workplace.

TOLL-FREE: **800-999-XXXX** TTY/TTD: **866-228-2809**

Available on demand starting DEC 19th

WWW.EAPHELPLINK.COM

COMPANY CODE: eapxox

workforce is a rich source of creativity and problem-solving.



Employee Assistance Program& Worklife Communications



Program Visibility Campaign







Program Communications

- Multimedia delivery plan:
- Direct mail to employer,
- web, onsite signage (plasma
- displays and posters),
- mobile application, and
- member engagement
- devices (i.e. magnets)
- Bilingual (English or
- Spanish)
- Relevant, timely, concise

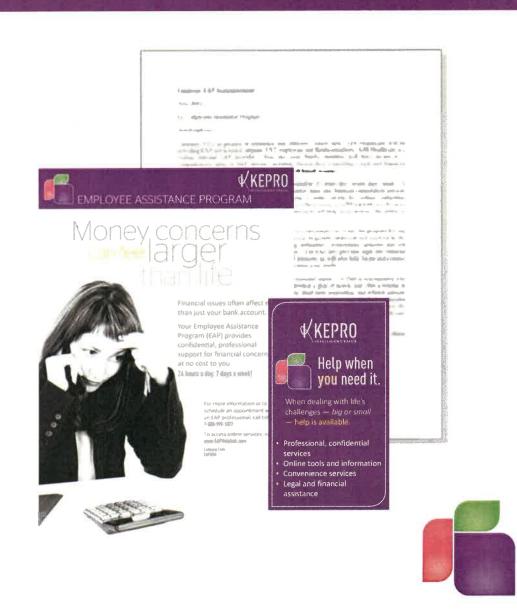


Program Launch



Introduction of Services

- Introductory letter announcing services and drive utilization
- Brochure and wallet card
- English and Spanish available
- Materials tie into existing programs/themes
- Co-Branding available



Quarterly Newsletters





Information for Members & Supervisors

- Digitally delivered newsletters that support the use of the EAP
- Engaging, concise articles
- Topics chosen to address a wide ranged of workplace issues
- Balance, our member publication, is available in Spanish
- Solutions, our manager publication, highlights best practices advice for managers to most effectively use the EAP available in Spanish
- Co-Branding available



Monthly Tip Sheets



General Informational Pieces

- Highlight relevant topics and supports the use of the EAP
- English and Spanish
- Simple, focused steps
- Includes call to action to program
- Co-Branding available



Critical Incident Tipsheets





Provides Information to Members

- Targeted, relevant information that supports the use of the EAP in the wake natural disasters, workplace issues, & etc.
- English and Spanish
- Simple, focused steps
- Includes call to action to program
- Provided on a short-turnaround time
- Co-Branding available



Program Website





- Program Identity and Branding
 - ✓ Logos , Graphics , Content , & Links
- Capabilities
 - ✓ Flexible layout, Event calendaring & News
- Thousands of Articles
- Updated, intuitive navigation
- Content Modules
 - Parenting, aging, balancing, thriving, working, living, and international
- Extensive On-Line Databases
 - ✓ Child, eldercare, legal and financial referrals
- Interactive Assessments
- Webinars on Demand



Posters







Onsite EAP Promotion

- Messaging about specific utilization triggers (stress, finances, worklife balance, and etc.)
- Visually engaging and consistent with other program materials
- Can be themed into multiple waves to support specific employee programs
- English and Spanish
- Co-Branding available



Mobile Application



i-Find Care

- Locate child/eldercare resources
- First mobile application of its kind
- Easy to use tool for members to locate, reference and evaluate providers
- Zip code look-up feature that identifies providers within a 20 mile radius
- Accessed by entering your website password







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OVERVIEW

KEPRO LEARNING SOLUTIONS' PHILOSOPHY

By providing a wide variety of seminars, KEPRO can assist your organization in promoting a healthy and motivated work environment where employees are engaged and effective in their roles. These learning opportunities are designed to educate and motivate employees and managers to be proactive and effective in managing their work responsibilities and personal lives.

Designed using adult learning theories, the seminars engage participants in collaborative learning. Our carefully selected and experienced training professionals guide facilitation of content that is based on industry research, skills practice, action planning, and group discussions. The interactive environment allows for discussion and sharing of ideas, as well as accelerates the transfer of learning back to the job and the participants' personal lives.

Seminars are designed to assist participants in learning new skills, adapting to change and challenges, increasing performance, and utilizing resources that enhance personal effectiveness and morale. Participants gain practical knowledge and useful strategies to help them problemsolve and improve relationships. The benefits to the organization include retention and commitment of key talent and high performers, higher levels of engagement and motivation, and a more knowledgeable and focused workforce.

These seminars are generally offered in 1- or 2-hour sessions during the lunch hour or workday. Our flexible schedule adapts to your allotted time slot—1-hour, half-day, or full-day sessions—or a seminar series.

Initiatives for Life, People Management, and Professional Development

The KEPRO Learning Solutions team staffs experts in human resources, organizational development, talent management, and training and development to design and deliver customized programs for organizations' unique training needs. On average, we consistently receive high scores on participant and host evaluations (host evaluations 98%; participant evaluations 99%).



WHAT WE OFFER

The Learning Solutions team has memberships to professional training and academic organizations to stay abreast of the technology, training research, and workforce development industry. We currently serve on HR management boards, in professional networking organizations, and as adjunct instructors at local colleges.

Our network trainers have a minimum of 5 years of experience in their content area(s), knowledge of the industry, and familiarity with workplace environments. All trainers have knowledge of adult learning theories and principles, facilitation skills, and a minimum of an associate's or bachelor's degree; the majority of our trainers are degreed at the master's level. All experience and licensing information is verified prior to acceptance into our network.

We continually recruit qualified trainers in specific content areas and specific geographic regions; the training network is continually developed based on the specifications of client needs. Our facilitators are selected for their subject matter expertise, facilitation skills, and knowledge of workplace practices and adult education principles. Facilitators have experience in the following content areas:

- Workplace issues
- Personal development
- Caregiving
- Geriatric services
- Legal matters
- Consumer financial Issues
- Parenting
- Wellness
- Management development
- Organizational development
- · Leadership development

CLASSROOM TRAINING

Collaborative learning engages participants in their own learning through guided facilitation of meaningful learning, illustrations, exercises, practical examples, and group discussions. Facilitators present practical information, help manage the session with flexibility to meet participant needs and expectations, and recognize that the character and learning style for each learner varies.

ONLINE TRAINING

Online seminars and e-Learning are an excellent venue to communicate topics of interest to a decentralized workforce. Online seminars offer an excellent opportunity to connect participants with subject matter experts without the geographic constraints. Employees register for the sessions through a Web portal. Bring instructor-led training directly to your desktop while accommodating your busy schedule. Using a Web browser and your telephone, interact with a qualified trainer who will guide your learning and answer your questions in real time. Our interactive e-Learning courses are individually paced and offer convenient self-guided learning.

2017 ONLINE SEMINAR TOPICS

CONDUCTING A SYSTEM CHECK

Prior to joining an online seminar: If you are attending an online seminar for the first time, you will need to check your current technology against the WebEx technology requirements.

Monthly Theme

MIND YOUR MONEY
Ensuring your financial

well-being

IGNITE A SPARK

FEB Expanding your life through creativity

JAN

ACCENTUATE THE POSITIVE

MAR Taking a more mindful approach

STAYING POWER

APR Resiliency skills for caregivers

#HAPPINESS
Creating support
environments for children

JUN GOING THE DISTANCE
The path to total well-being

JUL Celebrating the multigenerational workplace

AUG SAYING GOODBYE
Honoring the process
of grief and loss

MIXOLOGY

SEP Find your way to the right resources

OCT An active approach to well-being

NOV GRATITUDE ADJUSTMENT
Appreciating all that is good

DEC Embracing a multicultural workplace.

Monthly Online Seminar*

Maintaining Personal and Fiscal Resiliency During Tough Economic Times Available on demand starting JAN 17th

Creativity 101Available on demand starting FEB 21st

Disrupting Negative ThoughtsAvailable on demand starting MAR 21st

Compassion Fatigue: Increasing Resiliency Available on demand starting APR 18th

Raising Well-Adjusted Kids Available on demand starting MAY 16th

Emotional Support: Staying Balanced in a Changing WorldAvailable on demand starting JUN 20th

Managing in a Multigenerational Workplace Available on demand starting JUL 18th

Bereavement: Coping With Loss Available on demand starting AUG 15th

Information OverloadAvailable on demand starting SEP 19th

Improve Your Health With Ergonomics and Frequent Movement Available on demand starting OCT 17th

The Mind-Body Connection
Available on demand starting NOV 21st

Diversity in the Workplace: Maintaining an Inclusive Environment Available on demand starting DEC 19th **Online Seminar Description** — Online seminars can be found on your home page, or you can search for them by title.

Learn how to develop a "stress plan" to visualize a more positive financial future. Understand the process of prioritizing your needs and exploring the full extent of your assets.

"Creativity is putting your imagination to work, and it's produced the most extraordinary results in human culture" –Ken Robinson. Learn to tap into your creativity and apply it in all areas of your life.

It's not negative thoughts themselves that are the issue; rather, it's when we believe those negative thoughts. Learn how to gain control over negative thoughts and turn them into positive ones.

Caregivers often take on the emotions of those they help or rescue. After understanding how compassion fatigue can develop, you'll learn specific strategies to reduce stress and to develop resilience.

Review the current research and science behind raising well-adjusted kids. Learn tips to foster positive mental health in the children and teens in your life.

Change impacts all aspects of life. Every change brings a chance to self-improve or self-destruct. This session explores how people who know how to manage change have more successful lives.

Identify the characteristics and key motivational factors of each generation. Explore commonalities and discuss differences to build strong teams while bridging the generational gap.

Grief and loss trigger conflicting emotions. Explore your own reactions to loss, from a death to divorce. Learn why some people are stuck in a "grief rut" as you discuss more healthy ways to grieve.

Managing the enormous amount of information that is thrown at us is difficult. Understand what contributes to information overload and apply tips and tools for effectively managing information.

Sedentary behavior is the fourth leading risk factor of death for people all over the world. Learn to incorporate frequent desk exercises and movement into your day. Additionally, learn proper ergonomic tips to help ease job stress and reduce chronic injury.

Keeping the body relatively calm is crucial to well-being and optimal health. Becoming aware of how your body feels when it is under stress is important to maintain a relaxed and calm state.

Each member of the workforce brings unique skills, background, and experience vital to the successful organization. A diverse workforce is a rich source of creativity and problem-solving.

Individual Program Utilization

Individual Utilization includes all individuals accessing services during this reporting period. This number of individuals is divided by the number of eligible employees. For quarterly reports, the result is multiplied by four to produce an annualized rate. The year-to-date utilization rate is calculated by dividing the total number of cases by the number of eligible employees.

	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	YTD
Employee Count	92314	92321	92225	94920	96913	95917
EAP Cases	832	826	774	880	853	1733
MC Cases	103	92	102	111	141	252
Total New Cases	935	918	876	991	994	1985
Individual Utilization	4.1%	4.0%	3.8%	4.2%	4.1%	4.1%

Session Count

The session count represents the number of unique sessions delivered within the quarter.

	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	YTD
Session Count	1,315	1,299	1,180	1,439	892	2331

Overall Program Utilization

The Overall Service Utilization includes each service accessed by individuals during this reporting period. An individual may have received one or more services. The number of services is divided by the number of eligible employees. For quarterly reports, the result is multiplied by four to produce an annualized rate. Year to Date utilization is calculated by dividing the total number of services by the number of eligible employees.

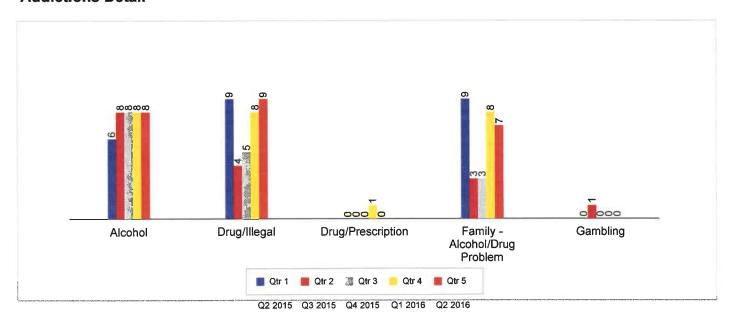
	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	YTD
Employee Count	92314	92321	92225	94920	96913	95917
Total New Services	1793	1714	1619	1875	1,845	3720
Overall Utilization	7.8%	7.4%	7.0%	7.9%	7.6%	7.8%



Primary Assessed Problem at Intake

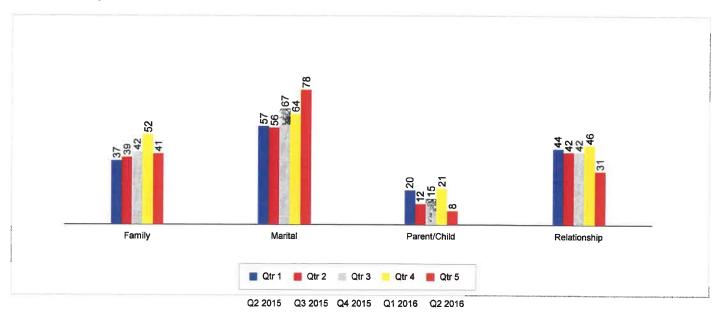
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	Q2	2015	/ Q3	2015	/Q4	2015	/ Q1	2016	Q2	2016		<i>L</i>
Category	#	%	#	%	#	%	#	%	#	%	#	%
Addictions	24	2.9%	16	1.9%	16	2.1%	25	2.8%	24	2.8%	49	2.8%
Anxiety	33	4.0%	39	4.7%	30	3.9%	33	3.8%	34	4.0%	67	3.9%
Depression	49	5.9%	48	5.8%	60	7.8%	61	6.9%	56	6.6%	117	6.8%
Emotional Wellbeing	180	21.6%	173	20.9%	154	19.9%	163	18.5%	174	20.4%	337	19.4%
Occupational	103	12.4%	107	13.0%	89	11.5%	119	13.5%	132	15.5%	251	14.5%
Other	4	0.5%	9	1.1%	5	0.6%	11	1.3%	11	1.3%	22	1.3%
Physical Health	9	1.1%	5	0.6%	7	0.9%	12	1.4%	7	0.8%	19	1.1%
Relationships	158	19.0%	149	18.0%	166	21.4%	183	20.8%	158	18.5%	341	19.7%
Violence	6	0.7%	9	1.1%	11	1.4%	6	0.7%	13	1.5%	19	1.1%
Work Life	266	32.0%	271	32.8%	236	30.5%	267	30.3%	244	28.6%	511	29.5%

Addictions Detail

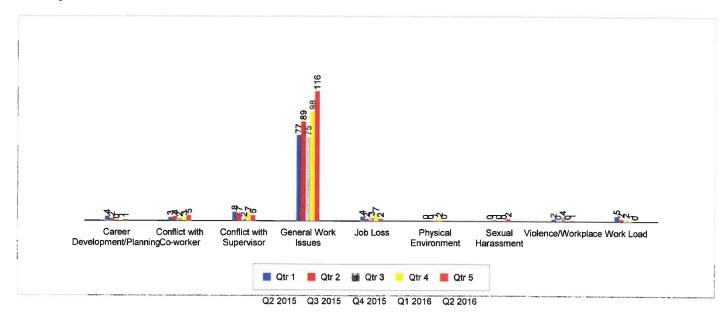




Relationship Detail

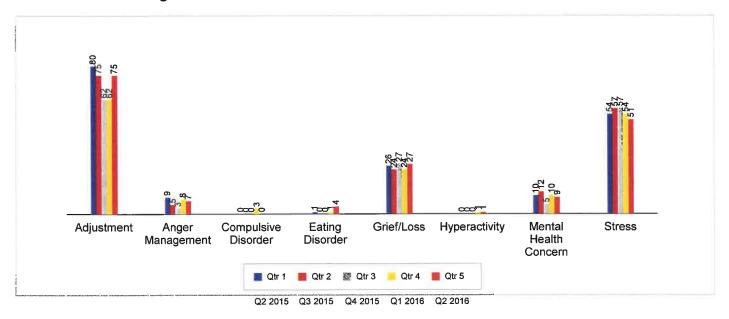


Occupational Detail





Emotional Wellbeing Detail



Work Life Detail

