2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at **wvOASIS.gov**. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at **WVPurchasing.gov** with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Jump to: FORMS | Go | Home | Personalize | Accessibility | App Help | About

Welcome, Lu Anne Cottrill | Procurement | Budgeting | Accounts Receivable | Accounts Payable

Solicitation Response(SR) | Dept: 0313 | ID: ESR06141700000006367 | Ver.: 1 | Function: New | Phase: Final | ▼ | Modified by batch , 06/14/2017

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☰ List View

General Information | Contact | Default Values | Discount | Document Information

Procurement Folder: 339746	SO Doc Code: CRFQ
Procurement Type: Central Contract - Fixed Amt	SO Dept: 0313
Vendor ID: VC0000053865	SO Doc ID: DEP1700000026
Legal Name: REACH EAP LLC	Published Date: 6/12/17
Alias/DBA:	Close Date: 6/14/17
Total Bid: $22,869.00	Close Time: 13:30
Response Date: 06/14/2017	Status: Closed
Response Time: 12:46	Solicitation Description: Addendum 1- Employee Assistance Services
	Total of Header Attachments: 5
	Total of All Attachments: 5

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

State of West Virginia
Solicitation Response

Proc Folder : 339746

Solicitation Description : Addendum 1- Employee Assistance Services

Proc Type : Central Contract - Fixed Amt

Date issued	Solicitation Closes	Solicitation Response	Version
	2017-06-14 13:30:00	SR 0313 ESR06141700000006367	1

VENDOR
VC0000053865
REACH EAP LLC

Solicitation Number: CRFQ 0313 DEP1700000026

Total Bid : $22,869.00   **Response Date:** 2017-06-14   **Response Time:** 12:46:46

Comments:

FOR INFORMATION CONTACT THE BUYER

Jessica S Chambers

(304) 558-0246
jessica.s.chambers@wv.gov

Signature on File   FEIN #   DATE

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Employee Assistance Services				$22,869.00

Comm Code	Manufacturer	Specification	Model #	
84131609				

Extended Description : Employee Assistance Services

Comments: Additional pricing options are provided in the proposal
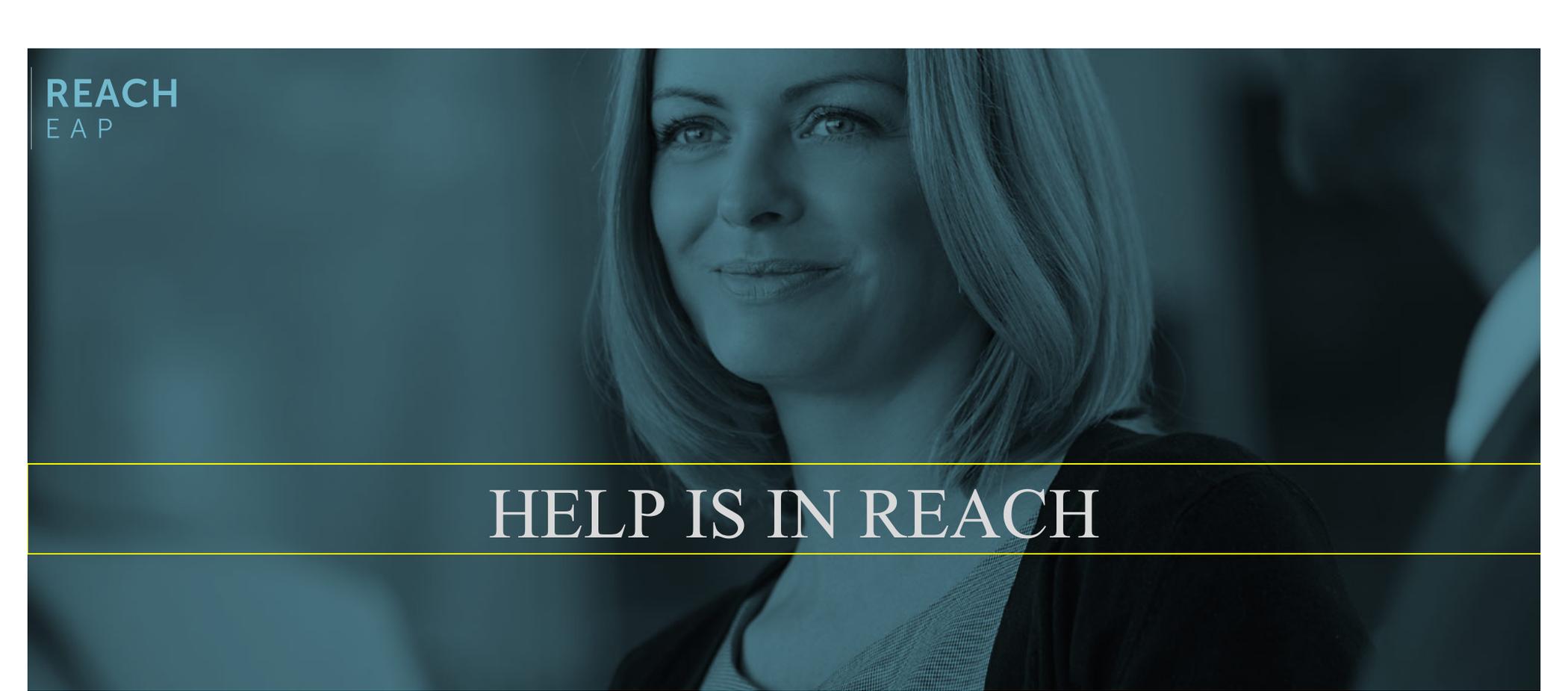
HELP IS IN REACH

**Proposal for
West Virginia
Department of Environmental Protection**

offered by

**Reach EAP
1-800-950-3434
www.reach-eap.com**

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June 14, 2016

Jessica Chambers
2019 Washington Street East
Charleston, WV 25305

Dear Ms. Chambers:

Reach EAP, LLC (herein, written as Reach EAP) has been in business for over 30 years, providing high-touch, effective EAP services to organizations like yours. We are proud to have served as your EAP since 2014 with Jonna Wilson as your Clinical Account Manager**,** and we are dedicated to continuing to provide a high-touch EAP with a focus on strong customer service.   Jonna maintained a strong working relationship with your former HR staff and will continue to work closely with Cher to ensure that EAP services meet the needs of DEP employees. Your EAP utilization has ranged from 2.08% up to 3.43% for EAP visits against an industry standard of 3%. In addition, utilization of work life activities and cases**,** along with workplace EAP activities has ranged from 3.43% to 17.65%. This is indicative of the strong customer service base and relationship between Reach EAP and West Virginia DEP and the fact that employees, family members and managers know how to effectively utilize the Reach EAP system.   Our goal is to continue to strengthen that relationship to provide an effective EAP for your company.

Reach knows that our relationship with your Human Resources Department and your managers and supervisors is key for us to understand your EAP needs. This ongoing relationship will enable us to personalize our unrivaled services to be the effective EAP your organization needs. Also important is the fact that Reach has a strong presence in West Virginia with our main office located in Charleston. In addition, we have a strong network of area counselors available to meet the EAP needs at locations preferred by your employees in your field offices.

In continuing as your EAP, Reach will maintain an   emphasis on customer service and effective best practices which is how we stand out from our competitors.   Your EAP Plan is customizable and comprehensive according to your needs and desires. We seek to ensure that your plan is meeting your needs with scheduled evaluations via thorough review of utilization reports, discussions with your key management staff, and ongoing review of the clinical trends and needs as we interact with your staff and employees. We want our EAP services to translate into a productive workforce for you. We give your employees, supervisors, and organization the support they need, when they need it, to become a better adjusted and more reliable work force, which decreases your overall costs.

Again, the key is for Jonna to continue to build a relationship between REACH and your Human Resources Department as well as your supervisors and managers who have the most contact with your employees. This relationship is fundamental to our understanding of how your organization functions and is the basis for the execution of your EAP model plan.

Our ability to perform these services is outlined in the Executive Summary on the following page. We are committed to delivering and providing the highest level of employee assistance, work-life, and workplace support services in the industry. Dana Hiatt, Director of Business Development, is the point of contact for this proposal for EAP questions and negotiations. Reach EAP would be delighted to make a formal presentation to the EAP Selection Committee if requested.

Reach EAP has extensive expertise and experience, which allows us to create an environment of security and support for your organization through high quality information, rapid response, customization and creativity. We are a high-touch, customer focused EAP. We look forward to continuing our partnership with West Virginia DEP.

Angela Diver, Executive Director
Angela.Diver@reach-eap.com

&

Dana Hiatt, Director of Business Development
Dana.Hiatt@reach-eap.com

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Executive Summary

EXPERIENCE

Reach has been providing EAP services for nearly 30 years and Work-Life services for over 12 years. Our foundation is built on EAP core technology and program customization with a focus on customer service. We have built on this foundation to create a proficient EAP.

Our keys to EAP success:

1. Communication with Human Resources
2. Communication and trainings with Managers and Supervisors
3. Employee engagement services
3. Customization of your program to meet your organization's specific needs
4. Definitive and outlined outcomes that support why you should choose to purchase Reach EAP services for your organization.

CRITICAL INCIDENT RESPONSE

Critical incidents are difficult situations but can be more manageable when you and your company are prepared. Reach EAP provides critical incident consultation and provides support for critical incidents. During a critical incident, we assist with internal communications, set up onsite support, consult regarding employee announcements, provide recommendations, and provide managers and employees education about reactions to and recovery from these types of situations.

All of our EAP Account Managers are formally trained and well-experienced in Critical Incident Stress Management (CISM). We provide prompt consultation services and work with you to determine the best response services to use for your particular incident. In accordance with our protocol, requests for critical incident assistance takes precedence over all other EAP activities which allow members of our staff to be onsite on short notice if needed.

Follow-up is one of the most important features of our CISM plan. Our follow up happens immediately after the incident and then over the course of time (determined by the type of incident and your account manager). During these follow-up activities, your account manager will be asking human resources and manager(s) involved, the appropriate questions to determine what additional services might be needed either on a group basis or individually. Often, we don't know the impact that trauma has until weeks and sometimes months after the event. We pay special

In response to a CISD for a plane crash, HR informed us – "I felt it (Reach support) went well with a few actually opening up, and for me that is a good sign. Thanks for your quick response. A quick response like this has been noted. Again, thanks."

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attention to your manager(s) during this time as they are often the ones under the greatest stress because of their leadership role for their staff. A joint Reach/WV DEP Response Team can be created as another resource to provide a timely response in the event of a traumatic event impacting your workplace.

Award presented to REACH EAP from Virginia Tech

With Admiration and Appreciation

A horrific act of violence committed against innocent members of the Virginia Tech community on April 16, 2007, spurred a spontaneous outpouring of love and support from throughout the world. The good people of REACH came to the aid of the Virginia Tech community during those dark hours. You asked for nothing more than a chance to help and comfort those wounded, traumatized, and deeply affected by the tragedy.

On behalf of the Virginia Tech Board of Visitors, the Virginia Tech administration and the greater university community, we extend our sincerest thanks and eternal gratitude for your caring support and human kindness given to our community in the darkest hours.

Signed: Charles W Steger, President and Jacob A. Lutz III, Rector

CISD Experience

Reach was the primary CISD responder to the staff and faculty of Virginia Tech for the campus tragedy in 2007. We had as many as nine Reach staff on site for up to two months following this incident. We were also the primary responder and the coordinator of CISD services for the West Virginia Upper Big Branch Coal Mine incident in the spring of 2010. Additionally, after 9/11, Reach provided 47 CISD debriefings to our client organizations, including two in New York City. Reach has provided many debriefings for police teams and fire departments and we actively consult on and are a part of protocols where affected police and fire teams are seen individually and follow-up is provided to ensure they have the support they need. We offer you the benefit of our many years of CISD experience.

Our Rapid Response Team (RRT) is available 24/7 to respond to critical incidents. Reach is immediately available to consult on critical incident situations and can be onsite if needed to assist with a critical incident within 24 hours. Our RRT is knowledgeable, experienced and trained in the best practices for critical incidence response. All of our account managers have assisted in numerous critical incidents and use their expertise and knowledge to aid your employees in recovering from the traumatic event.

EAP EFFECTIVENESS

Reach EAP provides quality, confidential, and responsive EAP sessions for your employees and their family members. Our staff is held to the highest standards in the industry which in turn produces high marks from our clients on the cumulative EAP Client Questionnaires. Below is a summary of Reach client services response Questionnaires:

- I was treated with courtesy and respect – 100% agreed
- I was scheduled an appointment in a timely manner – 100% agreed
- I feel confident that my confidentiality was maintained – 100% agreed
- I would use the EAP again or recommend it to others – 100% agreed
- I am satisfied with the services I received – 95.56 agreed
- I feel that my counselor provided me with helpful suggestions and strategies for dealing with my problem – 93.43% agreed

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Additionally, more than 99 % of client cases are complaint-free.

STAFF CREDENTIALS AND CAPABILITY

Reach staff includes experienced masters-level and doctoral-level licensed behavioral health specialists. Each of our account managers have over eight years of behavioral health experience. Staff credentials include the following (but are not limited to):

- Certified Employee Assistance Professional (CEAP)
- Certified Substance Abuse Counselor (CSAC)
- Licensed Clinical Social Worker (LCSW)
- Licensed Professional Counselor (LPC)
- Critical Incident Stress Management (CISM) (de-briefer)
- Substance Abuse Professional (SAP)

SUBSTANCE ABUSE PROGRAM

Our counselors, affiliate providers and staff have the credentials and experience related to identifying and intervening in situations where chemical dependency or alcohol abuse present as the main clinical issue(s). Our standard counseling assessment includes a risk assessment for substance abuse/misuse. Reach uses additional alcohol/drug assessments when needed.

Often, callers presenting with substance abuse or drug addiction issues and in crisis are most appropriately suited for treatment available only through long-term counseling. In this case, we assist the caller in contacting the most appropriate community resource to manage the issue. In most cases though, the EAP short term model allows the counselor to work closely with the client and resources to locate the most appropriate short or long-term treatment program. We provide referral services and assist the client in determining financial resources for treatment including insurance coverage.

If requested, Reach can provide training to all supervisors/managers as well as employees on substance abuse awareness. Furthermore, we can work with Human Resources on policies and procedures as they relate to substance abuse and the workplace.

Our network includes qualified Substance Abuse Professionals (SAP). These SAPs have specialized DOT training to handle cases where an employee tests positive for drug use. A DOT employee that has tested positive and falls underDOT regulations will be referred to one of these professionals to follow standard DOT treatment procedures. The employee will complete an initial assessment with the referred SAP, who will then determine the course of treatment to be completed by the employee before returning to work. Once the employee has completed all items listed in the SAP's recommendation for treatment, they will return to the SAP to complete a final assessment. Your account manager will communicate with

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the SAP throughout to track the progress of the case and provide reports of the employee's compliance to a designated company representative. Your account manager will provide a return to work meeting if needed.   DOT/SAP referrals are outside the scope of the traditional EAP and, as such, are billed at an additional fee.

TRAININGS

Reach provides trainings that meet your needs and desires. We can present trainings within the time available for employee and managers such as "Lunch & Learn Seminars" or within a preferred time allotment. Trainings can be via webinar or on-site. Reach employee seminars address workplace, personal and family, and health and wellness issues. Upon request, Reach can make a customized training. Also, Reach will meet with Human Resources and review utilization reports and suggest effective trainings based upon those findings. Reach can provide, upon request, outlines, training handouts, and copies of PowerPoint presentations.

We assist Human Resources by providing mandatory training seminars on topics such as prevention of sexual harassment, diversity and substance abuse awareness.

For Reach to evaluate the effectiveness of our trainings, we ask seminar participants to voluntarily complete and leave unsigned five-point Likert Scale Training Evaluation Forms. The feedback helps us evaluate the relevance and the effectiveness of supervisor training and the employee education seminars. This information is summarized and provided to Human Resources. Evaluations will be discussed at regularly scheduled meetings with Human Resources.

Through our Work-Life services, we offer monthly webinars on a variety of topics and Skill Builders. Skill builders are online training programs available to your employees.

COACHING

All of our coaching programs work together with our EAP and Work-Life services to create a holistic approach to EAP services. We believe that for EAP services to be effective they need to complement each other to address both mental and physical health. Additionally, according to employee comfort level, it is beneficial to offer both counseling and coaching services since some may feel more comfortable with a coach and others with a counselor. We offer this service because we know not all employees are looking for counseling. Coaching provides your employees the opportunity to work on their goals for the future and to maximize their personal and professional potential. Our coaching services are telephonic.

Work/Life Coaching

Reach offers telephonic Work/Life coaching for your employees. Our focus is to provide additional support options for your employees to assist them with personal and work issues. Employees are provided up to three (3) self-referred, telephonic appointments with a certified Coach per issue.

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Supervisor Coaching

We offer supervisor coaching with a certified coach for your supervisors and managers. Our focus is to improve their effectiveness in dealing with difficult employees and workplace team issues. Coaching is personalized to the individual supervisor or manager's leadership style in general and specific to particular challenges with which he or she may be confronted. Supervisors are provided up to three self-referred, telephonic appointments with a certified Coach per issue.

BACK-TO-WORK ASSISTANCE

We will assist your employees who have been off work for treatment or for a disability, to participate in a back-to-work meeting with the returning employee and the employee's supervisor to facilitate the employee's reintegration into the workplace. This is also an ideal forum for the exchange of information regarding the supervisor's expectations of the employee, and any special considerations that the employee may have to facilitate his or her recovery. (Note: the exchange of employee information is upon the employee's request and will require a release of information.)

WORK-LIFE SERVICES

Reach partners with Workplace Options in Raleigh, NC to provide the best in quality and work-life support in the US and throughout the world. Workplace Options delivers service to more than 48 million individuals worldwide as a leading provider of employee effectiveness and well-being services. Together, we offer more than 50 years of combined experience. Our joint offering will ensure that you can offer the highest quality and most cost-effective EAP and Work Life Services for your employees and their family members.

EXTENDED EAP SESSIONS

Since the goal of Reach is improved job performance, the number of EAP sessions required to address and resolve job-related workplace issues for management-referred employees may be extended as needed at no cost to you or your employees and is done at the discretion of the counselor.

**Statement of
Continued Interest and Ability**

Our continued promise to you is that Reach will meet and exceed your expectations about how an employee assistance program can serve as an invaluable extension of your commitment to take the utmost care of your employees. We hope to continue our partnership to continue to make your employee assistance program the most innovative, useful and comprehensive service possible.

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Reach continues to be a stand-alone, full-time, independent EAP firm that is focused entirely on delivering comprehensive and responsive employee assistance services. Our ability to provide the best services in the EAP industry is founded on our experience in providing EAP services over the past 30 years and our strong focus on the EAP industry's core technology of providing workplace-focused, responsive, high-quality employee assistance services.

Primary Point of Contact

Dana Hiatt, LPC
Director of Business Development
1-800-950-3434
Dana.Hiatt@reach-eap.com

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SPECIFICATIONS

1. PURPOSE AND SCOPE: 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).

2. DEFINITIONS: The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

> **2.1 "Contract Services"** means Employee Assistance Resources Services as more fully described in these specifications.

> **2.2 "Pricing Page"** means the pages, contained wvOASIS or attached hereto as Exhibit A, upon which Vendor should list its proposed price for the Contract Services.

> **2.3 "Solicitation"** means the official notice of an opportunity to supply the State with goods or services that is published by the Purchasing Division.

> **2.4 "Employee Assistance Program (EAP)"** is an employee benefit program that helps employee assist with personal problems and/or work-related problems that may impact their job performance, health, mentally and emotionally well-being.

3. QUALIFICATIONS: Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum 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.**

With almost 30 years of experience, Reach has become a major provider of integrated EAP, Work-Life and Wellness services in all areas of business and industry. Reach is a full-service employee assistance program providing all the essential core technology services. This includes employee and family member short-term counseling and referral assistance, management

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consultation, management referrals, onsite supervisor training and employee seminars, onsite support for workplace conflict resolution and teamwork issues, leadership training, and critical incident support. We promote employee engagement through onsite EAP orientations, participation in health and benefit fairs and the frequent distribution of program promotion materials. Below are a list of our references.

References

1. Steptoe and Johnson, PLLC
Dave Gorman, HR Director
(304) 933-8105
400 White Oaks Boulevard
Bridgeport, WV 26330

From 1.1.2001 to present
848 Employees

Services Include:
EAP (5 Session Model)
WorkLife Web and Legal/Financial
16 Hours of Onsite Services

2. Princeton Community Hospital
Heather Poff, HR Director
(304) 348-7000
122 12th Street
Princeton, WV 24740

From 2.1.2008 – present
1,104 employees

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Services include:
EAP (3 Session Model)
WorkLife Web
2 Hours of Onsite Services

3. City of Charleston WV Police and Fire Department

600 Virginia Street
Charleston, WV 25330
From 5.1.2003 to present
316 employees

Police Department
Chief Brent Webster, Chief of Police
(304) 348-6460

Services include:
EAP (5 Session Model)
WorkLife Web Services
10 Hours of Onsite Services

Fire Department
Chief Mike "Scott" Shaffer, Fire Chief
(304) 348-8098

Services Include:
EAP (5 Session Model)
WorkLife Web Services
10 Hours of Onsite Services

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, Psychological Testing. Clinical staff shall be available throughout the State of West Virginia.

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Reach is staffed with behavioral health licensed and certified masters-prepared and doctoral-level EAP staff that exceed the requirement of six trained psychologists. The Reach clinical staff is available throughout the state of West Virginia, nationwide as well as internationally. Our Clinical EAP Specialists are all masters-prepared behavioral health professionals experienced in providing telephonic crisis intervention and counseling assistance. The credentials of our EAP staff members who may be touching the lives of your employees and their family members include:

- Certified Employee Assistance Professional
- Licensed Clinical Social Worker
- Licensed Professional Counselor
- Licensed Clinical Psychologist
- Certified Substance Abuse Counselor
- Licensed Clinical Addictions Specialist
- Substance Abuse Professional
- Certified Life Coach
- Certified Critical Incident Stress Management Facilitator
- Certified Wellness Coach

In addition, our clinical staff is trained to handle employee concerns and circumstances that may contribute to personal problems that affect job performance. Here is a list of common challenges that Reach experts address to aid employees and their families:

- Substance abuse
- Addiction
- Managing stress and anxiety
- Emotional distress and its triggers
- Career and job improvement
- Anger management
- Self-esteem
- Mood disorders
- Marital discord
- Family relationship challenges
- Personal growth

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- Grief and loss
- Eldercare concerns
- Financial problems
- Specifically, our clinical staff is trained to in:
- Family Counseling
- Child Counseling
- Adult Counseling
- Seniors Counseling
- Adolescent Counseling

As an EAP provider we do not provide psychological testing but if a referral is needed, we have psychologists that are able to conduct psychological testing. Clients will need to be responsible for the testing fees.

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/Call-in 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).

Reach provides all of the above services and explains our services in detail starting with 4.

Telephone/Call-in Counseling (Toll Free Number) accessible 24 hours per day – 7 days a week

Reach EAP services can be accessed 24 hours a day, 7 days a week, 365 days a year by calling the Reach Clinical Call Center's toll-free number. All calls are answered live and master's level counselors are always available for client assistance or to provide call-in counseling. EAP Specialists at our Clinical Call Center are our front line consultants. Their functions are to triage clients, to provide initial counseling and to schedule client services. They are the primary clinical staff responders to calls from your employees and family members. Our Clinical Call Center staff is bilingual (English and Spanish). In addition, Reach utilizes a Language Line program that connects callers to a service capable of translating up to 30 languages.

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4. MANDATORY REQUIREMENTS:

4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.

Reach services will not only meet but 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.

Policy and Procedure Review

Reach EAP offers our professional experience to assist Human Resources upon request to review EAP policies and protocols. This includes reviewing policy and procedures regarding chemical dependency and other personal problems that affect employee performance. Reach will make sure that the appropriate personnel assists with these reviews. Our goal is to ensure that EAP procedures are in sync with your disciplinary policies so that we optimize services to aid employees' return to full productivity.

Coordination with Health Care Benefits

If we determine the employee or family member requires behavioral health care beyond the scope of EAP services, our counselors will utilize the client's in-network providers whenever possible. We have been very successful in locating appropriate community providers who accept employees' health insurance. Employees are responsible for those professional service fees. If an employee or family member does not have health insurance coverage we work with them to find the appropriate community resource or behavioral health center with a sliding scale. When needed we also refer to community resources such as Alcoholics Anonymous and Al-Anon. In cases of domestic violence we refer to appropriate places that provide shelter and legal assistance. We always provide case management to ensure an appropriate referral has been made.

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Referral Process

Community Resource Quality Assurance Monitoring provides:

- Careful selection of referral resources and the collection of their credentials and areas of specialization.
- Feedback from referred clients on the effectiveness of their services and timeliness of their delivery system.
- Case management of client services provided by referral resources through signed Releases of Information from EAP clients.
- Formal evaluations of community and behavioral health referral providers to ensure that our clients are receiving both the quantity and quality of services that they require from referrals made by the EAP.

4.1.1.1 The vendor will create an Employee Assistance Program Policy and Procedure that will serve as a base for EAP activity.

Reach will meet with Human Resources and create an EAP program policy and procedure that will serve as the basis for EAP activity.

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.

The policy and procedure program will detail the procedural actions required to assure optimal program implementation as well as the interface between the EAP and other employee programs and benefits.

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

The policy and procedure will be developed within 90 days of the 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.

Reach will provide eight (8) onsite hours for onsite group intervention, training and critical incident response

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Orientation

We offer onsite EAP orientation sessions for employees at the beginning of our contract and thereafter as needed to explain the services and benefits of your EAP and to answer questions about the program. We also offer a monthly orientation webinar for the first six months of your contract and send you a link so you can access the orientation at any time.

Trainings

Mandatory Training

We assist Human Resources by providing mandatory training seminars such as prevention of sexual harassment, diversity and substance abuse awareness.

Trainers

Reach's highly experienced trainers and Certified Employee Assistance Professionals facilitate introductory and advanced supervisor seminars and the employee Lunch & Learn seminars. All trainings in our Training Library are developed by Reach staff who are experts in the topics. A list of our trainings is included in the attachments file.

Employee Education

Reach provides trainings in accordance with the training needs and desires of the WV DEP. We can present trainings within the time available for employee "Lunch & Learn Seminars" or within a preferred time allotment. Reach employee seminars address workplace, personal and family, and health and wellness issues. Also, Reach will meet with Human Resources and review utilization reports and suggest effective trainings based upon those findings. Employee seminars can be provided onsite or via webinars. Sample seminar topics include:

- Financial Stress Management
- Depression in the Workplace
- Assertiveness Training

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- Communication Skills
- Balancing Work and Family Life
- Effective Parenting
- Employee Morale
- Healthy Relationships
- Respect in the Workplace

A complete list of employee and supervisor seminar topics is included in the attachments file.

Training Materials

Reach provides employees who attend training workshops with outlines, training handouts, and copies of PowerPoint presentations.

Training Evaluation Reports

In order for Reach to evaluate the effectiveness of our trainings, we ask seminar participants to voluntarily complete and leave unsigned five-point Likert Scale Training Evaluation Forms. The feedback helps us evaluate the relevance and the effectiveness of supervisor training and the employee education seminars. This information is summarized and provided to Human Resources. Evaluations will be discussed at regularly scheduled meetings with Human Resources.   Ninety-four percent (94%) of training attendees state that our seminars are useful and informative.

Monthly Work Life Webinars

In addition to the onsite employee education seminars that Reach provides, your employees and family members have the opportunity to view monthly Work Life webinars. A list of these webinars is in the attachments file.

Skill Builders

Skill Builders are online training programs available through Work Life Services. Skill Builders include the following trainings:

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- Appreciating Personality Differences
- Cultural Diversity in the Workplace
- Nobody Likes a Bully: Bullying in the Workplace
- Recognizing a Troubled Employee
- Sexual Harassment Prevention in the Workplace
- Accountability
- Business Etiquette and Professionalism
- Drug-Free Workplace Compliance
- Effective Communication
- Self-Care: Remaining Resilient
- Emotional Intelligence for Success
- Estate Planning: Five Essential Documents
- Maximizing Your Day: Effective Time Management
- Caring for Aging Relatives
- The Art of Conflict Resolution
- Eating Your Way to Wellness

A list of Skill Builders is included in in the attachments file .

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.

Supervisor Trainings

Reach will provide multiple one-hour orientations 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. Reach will meet with HR to create a schedule for these sessions within 90 days of award of the contract.

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The goal of Reach's supervisor trainings is to familiarize supervisors and managers with our EAP services. The goal is to enhance the skills of supervisors and managers in providing effective leadership for employees and especially in dealing with troubled employees and unproductive work groups. The intention of supervisor training is to assist those in management positions in their ability to lead, confront when necessary and elicit the best work from their subordinates. We also train supervisors in identifying impaired employees and then how to make EAP referrals.

The most important benefit of this training can be seen by the high number of effective supervisory referrals to our EAP. This indicates that supervisors are identifying and referring troubled or impaired employees that are under their supervision.

Our "How to Use the EAP as a Management Tool" seminar for supervisors addresses the goals and objectives of the employee assistance program. We provide a supervisor manual for all supervisors. A copy of our supervisor manual is included in the attachments file. Topics include:

- How the EAP can partner with supervisors to address and resolve employee and work
- Group performance problems
- How to identify and address employee issues
- How to make supervisor referrals to the EAP
- Tips on how to follow-up with referred employees to ensure that they continue to be functional and productive
- What to expect from the EAP in terms of the development and implementation of EAP treatment plans that help return employees to full productivity

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.

Reach will provide orientation/training sessions for non-supervisory employees at the following DEP locations: Fairmont, Kanawha City, Logan, Oak Hill, Philippi, and Wheeling.

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

Given our focus on employee productivity, communicating with Human Resources and the referring supervisor is the key first step. Next, following the signing of Release of Information, we obtain the information necessary to understand the referred employees' job performance issues. We then formulate and implement a plan. Lastly, we provide feedback to the workplace regarding progress made as a result of EAP interventions.

Formal Management Workplace Referral Process

The following procedures are followed when supervisors or human resources make formal referrals to Reach EAP:

- Human Resources or the employee's supervisor determine whether an employee needs a formal EAP referral.
- Human Resources and/or the supervisor fills out the Reach Supervisory Referral form and reviews it with the employee. The form is signed by Human Resources, the supervisor, and the employee and faxed to Reach. The employee's signature allows us to inform the contact person that the employee has called to schedule an appointment.
- The employee will be asked by Human Resources or their supervisor to contact Reach for an appointment.
- When the employee contacts Reach an intake assessment will be conducted. The employee will receive counselors' names to call and schedule his or her initial appointment.
- The contact person will be informed that the employee called in to schedule their appointment.
- During the initial face-to-face appointment, the referred employee will be asked to sign a Release of Information to enable the EAP Specialist and Human Resources or the referring supervisor to share information regarding the EAP treatment plan and progress toward resolution of the employee's issue.

Workplace Referral Feedback

With a signed Release of Information, our EAP Specialists will maintain contact with the management referral sources to ensure that employees are making progress toward improving their job performance. Without a signed release, Human Resources can only be notified that contact was or was not made with the EAP and about compliance or non-compliance with a recommended course of action. Reach abides by all state and federal statutes and the Employee Assistance Professionals Association (EAPA) Code of Ethics in maintaining confidentiality and is in full compliance with all HIPAA requirements as a further assurance of the confidentiality of our EAP services.

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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.

Reach will assist in the "Conflict Resolution" process as needed. This consultation will 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.

Reach offers both generic and industry-specific training and assistance to address the reduced productivity, danger to the safety of your workforce, and organizational liability resulting from outward incidents of conflict in the workplace. Seminars include Workplace Harassment and Bullying, Violence on Campus, Law Enforcement Stress Management, Conflict Resolution Skills, and Prevention of Workplace Violence. Reach offers trainings and consultations as part of your EAP services. Reach can provide conflict management assistance to specific departments or your organization for additional fees.

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.

Reach offers onsite and webinar EAP orientation sessions. These are provided by Reach EAP staff or by a video we provide to DEP. These orientations are for employees at the beginning of our contract and thereafter as needed to explain the services and benefits of your EAP and to answer questions about the program.

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.

Reach will design a communications program based on DEP's unique variables.

4.1.4.2 The vendor will provide promotional material geared toward encouraging positive

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preventative health and early use of EAP services. Among the promotional items anticipated are; home mailings, handouts, brochures, posters and newsletter articles.

Employee Communications Program

We inform your employees about their EAP services in the following ways:

1. **Reminder Memo for Employees**

   Via a letter or email, addressed to each employee, Reach can remind your employees about their EAP services. We provide a memo that explains benefit information and how to access EAP and Work Life services.

2. **Announcement Memo for Managers**

   We send a reminder letter or email for managers to highlight their Reach EAP services specifically for managers. These detail how to use EAP as a management tool, how to access service information and an overview of the supervisory referral process.

3. **EAP Brochures and Wallet Cards**

   We will make EAP brochures and wallet cards available for all employees at the initiation of a new contract agreement and as-needed. The materials contain information on accessing and utilizing the services of Reach.

4. **EAP Posters**

   We will provide EAP posters for placement on employee bulletin boards. Three Reach Posters are included for your review.

5. **Ongoing Program Communications**

   On a recurring basis, employee communications will be provided electronically.

Proposal for WV DEP
Offered by Reach EAP, LLC

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6. **Quarterly Electronic Work Life Newsletters**

   We include a quarterly newsletter, Lifelines, with articles on a variety of
   work, home, and wellness topics.

7. **Monthly Work Life Promotional Materials**

   We will send, electronically, monthly flyers and posters. These will have announcements of Work Life
   webinars in which your employees can participate.

8. **Monthly Frontline Employee Newsletters**

   We provide monthly newsletters with articles of current interest to employees. We provide these electronically
   for distribution to your employees.

9. **Monthly Frontline Supervisor Newsletters**

   Practical information that helps supervisors be more effective leaders and managers is provided in newsletters
   sent electronically each month.

Copies of the promotional material are included in the attachments file.

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.

Reach's Frontline Newsletters and Work-Life Services promotional materials are provided monthly. Our
LifeLines newsletter is provided quarterly.

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.

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Reach 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.

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

Reach will meet with HR to discuss the subject matter for your trainings.

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.

Employee Education

Reach provides trainings in accordance with the training needs and desires of WV DEP. We can present trainings within the time available for employee "Lunch & Learn Seminars" or within a preferred time allotment. Reach employee seminars address workplace, personal and family, and health and wellness issues. Also, Reach will meet with Human Resources and review utilization reports and suggest effective trainings based upon those findings. Employee seminars can be provided onsite or via webinars. Reach will provide customized trainings upon request. Sample seminar topics include (Bolded are Reach's trainings that fits DEPs topic request):

Financial Stress Management (**personal budgeting)**
Depression in the Workplace
Assertiveness Training
Communication Skills (**interpersonal communications)**
Balancing Work and Family Life
Effective Parenting (**parenting skills)**
Employee Morale
Healthy Relationships
Respect in the Workplace
Alcohol/Drug Awareness (also, included in the supervisory training orientations)
Stress Management
Adapting to change (both on and off the job) **(Managing Change)**

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Reach can customize trainings to meet the needs of the DEP organization. Relationship Between Positive Mental Health and Dual Career Families are examples of those trainings we can customize upon discussion with DEP's POC.

A complete list of employee and supervisor seminar topics is included in the attachments file.

Mandatory Training

We assist Human Resources by providing mandatory training seminars such as prevention of sexual harassment, diversity and substance abuse awareness.

Trainers

Reach's highly experienced trainers and Certified Employee Assistance Professionals facilitate introductory and advanced supervisor seminars and the employee Lunch & Learn seminars. All trainings in our Training Library are developed by Reach staff who are experts in the topics.

Training Materials

Reach provides employees who attend training workshops with outlines, training handouts, and copies of PowerPoint presentations.

Training Evaluation Reports

In order for Reach to evaluate the effectiveness of our trainings, we ask seminar participants to voluntarily complete and leave unsigned five-point Likert Scale Training Evaluation Forms. The feedback helps us evaluate the relevance and the effectiveness of supervisor training and the employee education seminars. This information is summarized and provided to Human Resources. Evaluations will be discussed at regularly scheduled meetings with Human Resources.

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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 merging personal concerns. They should form a critical element in a preventative Employee Assistance Program.

Reach trainings teach skills to improve various aspects of your employees work and home life. Our trainings are tailored to meet you company's and employee's culture and trends. We can provide trainings that build on one another, create a theme throughout a year, or other creative options. When Reach provides a training we view this as an opportunity to build a relationship with your employees. We start all our trainings by reiterating your employees' EAP benefits and go over the reasons someone might reach out EAP services. Your trainer also ties in Work-Life services information to inform employees of their additional resources. We try and tie the information gathered from the training to real life so they can apply it in practical situations. We bring brochures and wallet cards to promote their EAP services. In addition, your Reach trainer will stay after the training to speak with employees who might have questions about the training topic or want to talk about any EAP concern.

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.

Our Reach therapists' qualifications include a current state license, a minimum of three years of post-masters experience, knowledge and experience in the EAP field, and proof of professional liability insurance. Providers' licenses and insurance certifications with expiration dates are kept on file and in our database which is updated regularly.

Reach provides thorough diagnostic assessments of client issues that include the identification of possible personal, family, and work problems that negatively impact employees' health, happiness, and job productivity. Short-term problem resolution techniques are used to address issues with the goal of quick restoration to an acceptable level of functioning. Other tools and methods may be used such as screenings for depression, anxiety, drug and alcohol use and various cognitive-behavioral modalities. Issues that cannot be resolved with EAP short-term assistance will be referred to appropriate resources and case-managed to ensure the effectiveness of treatment.

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Client Follow-Up

The client calls into the Reach 800 number to request services. Our intake specialist will gather the client intake information and determine the client's availability to see a counselor. The intake specialist will call the client back with the name of their counselor and an appointment day and time. If that day and time does not work, the client will be able to contact the counselor and set up a day and time that works for their schedule.

Reach will follow-up with the client in the following ways:

Within a week of the client's appointment request, the intake specialist will contact the client to confirm they attended their session and to discuss how they are doing.

Within 90 days of the initial contact with Reach, the intake specialist will contact the client to ensure they received the assistance they needed, that their session was beneficial and to see if they need further assistance.

The same intake specialist that conducted the intake will provide the client follow-up calls.

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.

Problem Resolution Rate

The term "problem resolution rate" refers to the percentage of client issues presented that can be addressed and resolved without the need for referrals beyond the scope of EAP services. Reach's problem resolution rate is 89%.

EAP Referrals

If an employee's issues cannot be resolved with EAP short-term assistance the employee will be referred to appropriate resources. The employee will be given a minimum of three referrals who are within your insurance provider network and who are the most cost effective to the employee. After the referral the employee's case will be managed to ensure the effectiveness of treatment.

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As your EAP provider we make sure the employee has maximized the use of their EAP services when appropriate before considering referrals; discuss with the client the need for and benefit of a referral; jointly plan the type and level of referral needed; guide the client in the selection of community services and referral providers who are deemed to be the best match for their special needs; and obtain a Release of Information so that the referral provider selected can provide treatment reports to the EAP counselor.

Reach criteria to determine if a referral is needed are:

- The client's problem is not appropriate for short-term problem resolution
- The client has a substance abuse issue that requires a specified treatment venue or the expertise of a certain subject matter expert
- Client presents as needing immediate hospitalization or medication
- Client can benefit from assistance in a support group setting with others dealing with the same issue

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

In the event of an urgent or emergency situation, for either a management referral or self- initiated request, Reach professionals are trained and available to conduct crisis assessments and brief intervention telephonically to determine the most appropriate course of action. Employees and family members with medical emergencies are directed to seek assistance from the nearest medical emergency facility, to be followed afterwards by Reach to ensure that the crisis is adequately resolved. We will monitor his/her care to ensure that the employee is able and prepared to return to work following a crisis or critical event.

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.

Reach will follow the Policy and Procedures that have been created specifically for WV DEP. Reach's normal guidelines are as follows: Our service delivery system guarantees both the anonymity and confidentiality of the client services that we provide to your employees and their family members. Employees are seen by appointment

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in private, comfortable and handicapped- accessible offices at convenient locations away from the workplace. Reach takes confidentiality seriously and is in full compliance with the federal mandates of the Health Insurance Portability and Accountability Act (HIPAA), which requires extra measures to protect the identifiable health information of your employees and their family members. Reach informs both verbally and in writing the exceptions of confidentiality to each client and explains the exceptions related to "danger to self and others" circumstances or "suspicion of child or elder abuse". If an employee is determined by Reach to be of harm to self or to others or suspicionof child or elder abuse is recognized, proper notification will be made immediately.

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

Reach will provide promotional materials and discuss promotional options with HR and work together to make sure employees are getting maximize usage of their EAP in order for you to reach you goal of 10%.

Reach's strategy for increasing utilization includes our trainings and management consultations. Also, the quality of our services leaves the vast majority of employees very glad they reached out for assistance. When your employees have a positive experience they often "spread the word" which increases utilization.

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.

Reach policies and procedures program will detail the specifics about self-referrals and supervisory referrals (SR). We will also use past utilization reports to establish expected utilizations for self-referrals and SRs.

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.

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Reach has a problem resolution rate of 89% and therefore expect that no more than 11% of our clients will be referred to use their health benefits. We are able to keep a low referral rate due to our proven short-term problem resolution protocol, our incorporation of Work-Life services into counseling sessions as a support tool, and our follow-up protocol which is not complete until the problem is resolved.

The follow-up protocol actually involves the entire problem resolution process and includes the following:

The client calls into the Reach 800 number to request services. Our intake specialist will gather the client intake information and determine the client's availability to see a counselor. The intake specialist will call the client back with the name of their counselor and an appointment day and time. If that day and time does not work, the client will be able to contact the counselor and set up a day and time that works for their schedule.

Reach will follow-up with the client in the following ways:

Within a week of the client's appointment request, the intake specialist will contact the client to confirm they attended their session and to discuss how they are doing.

Within 90 days of the initial contact with Reach, the intake specialist will contact the client to ensure they received the assistance they needed, that their session was beneficial and to see if they need further assistance.

The same intake specialist that conducted the intake will provide the client follow-up calls.

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

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skills.

Reach offers a comprehensive program that provides thorough assessments of client issues for early recognition, intervention and resolution of problems/dysfunctions. These include the identification of personal, family, and work problems that might negatively impact employees' health, happiness, and job productivity. Short-term problem resolution is focused on developing plans to address issues that result in an expedient restoration to an acceptable level of functioning. Issues that cannot be resolved with EAP short-term assistance will be referred to appropriate resources and case-management to ensure the effectiveness of treatment. Employees and family members may receive their designated number of EAP sessions per individual and per issue, not limited to year or family.

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.

Our counseling services incorporate the steps needed for the client to reach an appropriate level of functioning. These steps include but are not limited to the four step process of problem clarification, search for alternatives, personal action plan development and follow-up and support.

Short-term problem resolution techniques are used to address issues with the goal of an expedient restoration to an acceptable level of functioning. Other tools and methods may be used such as screenings for depression, anxiety, drug and alcohol use and various cognitive-behavioral modalities.

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.

Reach uses extreme care to assure objectivity in our referral process. We utilize a wide variety of client-support resources, including self-help groups for substance abuse and other issues, United Way services for credit card

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debt, partner abuse shelters for domestic violence issues, and inpatient and outpatient treatment facilities for mental health and substance abuse problems. Reach handles referrals to community resources very carefully, tailoring the referral to the particular needs of your employees and their family members which includes the location, fees and third-party coverage. Whenever possible, referrals to treatment resources will be made to employees' in-network providers.

Referral Assistance

In the event that a referral is indicated, Reach EAP professionals assist clients through:

- Helping clients pre-certify for mental health benefits and scheduling the initial appointment with a referral resource while the client is still in the EAP office.

- Obtaining a Release of Information so that the referral provider selected can provide treatment reports to the EAP professional.

Please note that when referrals are made for longer-term or specialized behavioral health treatment, EAP sessions are utilized to care manage the treatment provided by non-EAP providers. Monitoring of treatment plans also occurs by making follow-up contact with EAP clients to ensure that their presenting issues are resolved.

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

Yes, unless there is a life-threatening situation the client will make the final decision about their referral resource.

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.

Our Reach EAP case managers routinely follow-up with clients and referral service providers to ensure that issues presented to the EAP are resolved. It is our standard protocol to ask for an employee's approval for exchange of information and if agreed then ask for them to sign Releases of Information

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(ROI) that will allow us to communicate with treatment providers to ensure that our clients are receiving the assistance they need. If employees who have accessed the EAP receive psychiatric or substance abuse treatment, Reach will follow up with employees to ensure proper aftercare treatment is provided by skilled professionals as an extension of treatment and as a relapse prevention measure.

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.

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

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.

For supervisory referrals, our EAP Specialists maintain contact with the management referral sources. This ensures that employees are making progress toward the goal of improving their job performance. It also encourages follow through on the part of the employee. Reach will report to Human Resources that contact was or was not made with the EAP and about compliance or non-compliance with a recommended course of action. The supervisory referral form when signed by the employee gives us the ability to report initial contact and compliance or non-compliance. A release of information (ROI) will be signed during the employee's initial visit with their counselor face-to-face. Reach management referrals are seen as a support for your employee and not a punitive measure. We work with both the employee and the manager to assist with the presenting issue. In our conversations with managers we ask about client progress. Reach also uses this time to support the manager, offer management tools and plan strategy that might assist the manager in handling the situation or future situations.

Reach abides by all state and federal statutes and the Employee Assistance Professionals Association (EAPA) Code of Ethics in maintaining confidentiality and is in full compliance with all HIPAA requirements as a further assurance of the confidentiality of our EAP services.

4.1.9 Work-life Resource Program Counselors: This service is to provide 24-hour- a-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.

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Reach Work-Life services are available 24 hours a day, 7 days a week. Our Work-Life Consultants provide telephonic support to do the leg work for members, locating child care, home health care, assisted living facilities, schools, colleges, health clubs and pet services.

Work-Life Consultants

Work-life consultants must meet the following minimum requirements for their team:

- Child Care: a bachelor's degree in early education or a related field and three years of care experience
- Daily Living: a bachelor's degree and one year of related experience
- Elder Care: a bachelor's degree in counseling, social work or other related field and three years of experience in the field
- Financial Consultants: a bachelor's degree and one year of related experience, plus 40 hours of financial training and achievement of a 90% or higher on the final exam
- Financial Counselors: a bachelor's degree, certification as an Accredited Financial Counselor (AFC) through the Association for Financial Counseling and Planning Education, and one year of related experience
- Legal: a bachelor's degree and one year of related experience

Additional desired skills include:

- Intermediate computer capabilities (Outlook, Word, Internet searching, database)
- Adaptability in a fast paced environment
- Strong active listening
- Time management
- Ability to develop peer relationships
- Strong problem solving abilities
- Excellent written and verbal communication
- Spanish speaking is a plus

Our extensive work-life new-hire training includes 78 to 91 hours of classroom training, and 75 days of training with the team, and conducting research with close monitoring. After trainees complete the initial training period, they are required

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to undergo additional hours of training annually; the number of hours required varies based on their proficiency level.

Work-Life Consultations, Resource and Referral

The Process

The resource and referral services offered go well beyond simply locating available providers in an employee's area. For employees who choose to utilize our research and referral specialists, the process begins with a thorough consultation and assessment by a work-life specialist. The specialist performs an assessment to ascertain a clear understanding of all aspects of an employee's specific request. Because our consultants are specialists, not work-life generalists, the assessment often helps employees identify questions that they had not yet considered. 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 work-life specialist will offer suggestions and ideas for consideration when and where appropriate. He or she will also answer the employee's questions. Our consultants commonly provide guidance about topics such as the difference between various care options (e.g., day care centers vs. family day care homes), the most cost-effective options, and how to evaluate providers.

Upon completion of the assessment, the work-life specialist begins locating resources that meet the unique needs of that employee's request. For each work-life request, potential referrals in our database are contacted by telephone to verify services offered and confirm openings/availability/suitability. During this call, the data in the profile is also verified (e.g., fees, address, program features, hours of operation, etc.) and the record is updated as needed. In addition, all providers in our database for child care and adult care have been pre-screened and have appropriate state licensing in place to deliver care.

Referrals are delivered in the format agreed upon with the employee (e-mail, mail, fax, or phone). Only the confirmed and matched referral options are provided. In addition, the consultants develop a packet of information for each request that includes related articles, tip sheets, handbooks and additional information designed to assist the member in the decision making process.

Child Care Resource and Referral

Our child care consultants can offer resources surrounding care for mildly ill children; 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 to a lactation program. Consultants can also search for a

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variety of resources for children with special needs, such as respite care, in-home caregivers, financial guidance, testing and assessment resources, education programs, schools for exceptional children, and residential programs.

In addition, our website includes a number of resources related to child care. Parenting has information for parents of all different experience levels, and kids of all different ages. It offers advice on everything from raising your child's self-esteem to keeping backseat chaos to a minimum. The *Adoption* section provides helpful information on the process of adoption. Whether you are "just thinking about it", trying to maneuver the legal and financial aspects, or considering the special parenting needs of adopted children, the *Adoption* module offers tips and information for all stages of the process. *Child Care* can help parents consider the care options available and chose the one that best suits family needs. *Developmental Stages* provides insight into the maturation process from infancy through young adulthood. *Education* focuses on early development through adult education, and even offers some non-college educational options for young adults. *Kids' Well-Being* has tips for keeping your children safe and sound from infancy through young adulthood with an emphasis on health, safety, and a positive interaction with the world around them.

The website also offers self-search locators for child care, camps, and schools.

Elder Care Resource and Referral

When a caller expresses caregiver issues to a work-life consultant, 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), and national organizations or organizations dedicated to help individuals with a certain disease. Additionally, consultants 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. Any applicable literature about caregiving that is available through the fulfillment department would be sent to the caregiver.

If the individual is a long-distance caregiver, we offer a similar search to that described above. One exception is that we give the individual the option of locating resources near the caregiver 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 cared for by a professional. Any literature items found to be applicable would again be sent to the caregiver in this type of situation.

Our website also includes a number of resources related to aging and adult care. The Aging division speaks to caregivers, seniors, adults with disabilities, and everyone who is proactively planning for the future. Information about *Government Programs* for the elderly is included, as well as the essentials regarding *Housing Options* and *Home Care*. The *Health* module takes a look at some of the common side effects of growing older and what one can do to minimize

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his or her impact. *Aging Well* focuses on the positive with suggestions for seniors about keeping mentally and physically fit and having fun.

The website also offers a self-search locator for elder care services.

Daily Living Resource and Referral

The range of lifestyle issues included under the daily living category is vast. Consultants assist individuals with nearly endless resources such as finding care for their pets and managing their day-to-day responsibilities at home and work. The list below details just a few of the topics for which our daily living team can provide resource and referral services:

- Adoption
- Chore services/house cleaners
- Emergency services
- Event planning
- Volunteer opportunities
- Pet obedience training
- Fitness and wellness centers/programs
- Tutors

- Public and private educational resources

- Apartment locators
- Consumer comparisons

- Entertainment services
- Veterinarians
- Moving/relocation services
- Pet sitters/kennels
- Home repair (e.g., handymen, plumbers, contractors, etc.)
- Transportation and travel services

Our website also offers insight on a variety of issues our Daily Living team can address, including wellness resources. For example, a number of health and fitness resources are available in the Thriving division of the website. The *Live Healthy* module challenges users to objectively assess their health, take action with preventative screenings, and incorporate healthy lifestyle changes. *Healthy Eating* and *Medical Care* provide additional focus on two important aspects of a healthy lifestyle. Particular health concerns of different age groups are addressed in *Infants' and Toddlers' Health*, *Children's Health*, *Adolescents' Health*, *Seniors' Health*, *Women's Health*, and *Men's Health*. Information and resources for specific, common conditions and diseases can be found under *Health Challenges*. A similar wealth of resources is available for topics covered within the Aging, Balancing, Living, Thriving, and Working website divisions.

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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.

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.

4.1.10.1.2 Online tracking tools for DEP Wellness Coordinators; program tracking, program participation/points per employee/participant.

The information below answers questions 4.1.10 – 4.1.10.1.2

Wellness Coaching

Our telephonic wellness coaching program offers access to coaches who provide individualized, goal-oriented guidance, wellness education, strategy development, and encouragement. Throughout the process, coaches gently support and guide members while holding them accountable to their healthier lifestyle practices, coaching a well person to stay well and empowering those who have health challenges to improve. Together, individuals and coaches commonly design wellness plans around weight management, nutrition, tobacco cessation, fitness and exercise, stress management, and overall lifestyle improvement. Our coaches are also trained in providing support on integrating wearable devices to help individuals further manage their accountability.

Our wellness coaching program is built on a six-session model and it generally takes three to four months to complete the sessions. Coaches are available from 8am EST – 11pm EST to ensure coverage across various work shifts. In the first session, the coach helps the participant define his or her wellness vision.

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Coaches use a standard assessment to establish what the issues are using techniques such as checking on ambivalence and discord, internal and external barriers to change, and using readiness to change theory and confidence levels to assist the participant in setting relevant goals.

Subsequent conversations focus on experiments to test out healthier habits and learning from experience. From session to session, the participant's goals are measured for degree of success and amended if needed. Through dynamic collaboration, the coach and participant look at areas such as accountability and responsibility for proposed lifestyle changes.

Our coaching program is based heavily in a motivational interviewing approach. This is a member-centered, member-directed approach with an emphasis on building the employee's self-efficacy to make long-term behavior changes. We focus on achieving total wellbeing by addressing emotional, physical, and practical components.

Live Well Wellness Platform

The Live Well Wellness Platform bridges the science of behavior change theory with sophisticated digital technology to meet the challenges of health engagement. Built for users across the health status spectrum, this collection of interactive resources creates a personalized, relevant member experience.

Simple, direct, visually appealing, the Wellness Platform easily fits into the busy lives of today's health consumers through responsive design for access via computer, tablet, or mobile device.

Available features include:

- An integrated Health Assessment which drives relevant content to new users
- Planning, tracker, and journal tools
- Recipe finder, menus, and food database
- Demonstration videos
- Personalization options
- Member access to a peer community
- Incentives and point-tracking *
- Secure communication with wellness coaches *

User-friendly and user-focused, this platform paves the way for ongoing engagement by removing barriers

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to change and empowering people to adopt healthy habits.

Health Assessment

Our online HA is rooted in established medical research. Secure and confidential, it takes minutes to complete—but captures data essential for evaluating individual and population health. The HA prompts adoption of healthy habits, channeling members into risk-specific programs and reflecting progress over time. Upon completion, each member receives content tailored to their results which are displayed on the member's dashboard.

The individual HRA results include health alerts, recommendations, and personalized messaging that guides members to resources most appropriate for their risk areas. The entire report can be saved, printed, and shared with a healthcare provider to promote ongoing, health-focused dialogue, helping users maintain their health strengths and reduce health risks.

Wellness Seminars

We work with an experienced network of professional facilitators to deliver on-site or online sessions on a variety of wellness-related topics. Examples of seminar titles include:

- Bereavement: Coping with Losses
- Better Health Through Screening
- Compassion Fatigue: Increasing Resiliency
- Disrupting Negative Thoughts
- Eating Your Way to Wellness
- Eight Steps to a Healthy Heart
- Examining Relationships: Healthy vs. Unhealthy
- Let's Sleep On it: Developing a Healthy Sleep Pattern
- Relaxation Techniques at the Workplace
- The Path to Inner Peace
- Tips for Smoking and Tobacco Cessation

Our educational programs incorporate a variety of techniques (e.g., reflective exercises, games, participant involvement, and role playing) to provide interactive exploration of relevant topics and discussion of solution

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strategies to yield positive outcomes. Seminars can be offered in full-day, half-day, or one- to two-hour sessions that can be delivered during the lunch hour, at employee training conferences, during management meetings, at new-hire orientations, or at any convenient time. Clients can select from our offering of nearly 100 developed training topics or request a customized training specific to their needs. Sessions can be modified to reflect any client-specific requirements.

Reach understands that 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.

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

Your Account Manager will send quarterly EAP and Work Life statistical reports to Human Resources and well as a final yearly report.

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.
EAP Report Information

We will provide quarterly and annual confidential management utilization reports. Your designated account manager will meet with you quarterly to review these reports, analyze data, identify trends, and adapt the program based on results.

The reports include data covering:

- Caller demographics (age, gender, and status)
- Utilization summarized by division
- Issue categories for EAP and work-life cases
- Identified personal and work-related issues
- General assistance queries (not counted as utilization)
- Web hits
- Method of contact
- Workplace activities (on-site events including training, crisis support, etc.)

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To ensure employees' privacy, we do not individually report on a division so small (≤100 employees) that there is a risk for disclosing individual employee information; such statistics are incorporated into organization-wide reports. For divisions with 100 or fewer employees, the only data to be provided is an indication of whether or not there was utilization within the division. Other utilization details are factored into the aggregate report.

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

Reach Utilization Reports are confidential (they only reflect the numbers and types of problems presented to Reach) and they are limited to reflect statistical data on the program utilization. Reach interprets the utilization reports and provides suggestions for EAP services. A sample utilization report is included in the attachments file.

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

Reach provides an annual report that includes year-end statistical findings, a review of all programming activities for the year, interprets the utilization reports and provides suggestions for EAP services and program reinforcement.

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

Reach EAP agrees that all employee records are considered to be the property of the State of West Virginia.

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

Upon termination of this contract, Reach shall turn over all employee records, at no cost to the agency.

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.

Upon written request by WV DEP, Reach shall transfer all records to another vendor, in a safe and secure manner.

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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.

If no transfer is requested, within one year, Reach shall destroy all records in a safe and secure manner, at no cost.

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

Reach will bill, in arrears, on a monthly basis although quarterly can be accommodated as well.

5. CONTRACT AWARD:

5.1 Contract Award: The Contract is intended to provide Agency with a purchase price for the Contract Services. The Contract shall be awarded to the Vendor that provides the Contract Services meeting the required specifications for the lowest overall total cost as shown on the Pricing Pages.

Reach understands the above statement.

5.2 Pricing Page: Vendor should complete the Pricing Page (Exhibit A) by inserting the lump sum monthly cost and extended total for 12 months on the Oasis page line. Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified.

Vendor should type or electronically enter the information into the Pricing Pages through wvOASIS, if available, or as an electronic document. In most cases, the Vendor can request an electronic copy of the Pricing Pages for bid purposes by sending an email request to the following address: jessica.s.chambers@wv.gov.

Reach has completed the pricing guide.

6. PERFORMANCE: Vendor and Agency shall agree upon a schedule for performance of Contract Services and Contract Services Deliverables, unless such a schedule is already included herein by Agency. In the event that this Contract is

designated as an open-end contract, Vendor shall perform in accordance with the release orders that may be issued against this Contract.

Reach and WV DEP will agree upon a schedule for performance of Contract Services and Contract Services Deliverables.

7. PAYMENT: Agency shall pay the monthly lump sum cost per month, in arrears, as shown on the Pricing Pages, for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

Reach understands and agrees with the above statement.

8. TRAVEL: Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

Reach does not charge for mileage or travel costs to perform the services offered in this proposal.

9. FACILITIES ACCESS: Performance of Contract Services may require access cards and/or keys to gain entrance to Agency's facilities.

If access cards and/or keys are required:

Reach understands the requirements of WV DEP and will work within your access requirements.

> **9.1 Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.**
>
> Jonna Wilson, MSW, LCSW, will be your primary account manager and the person who will need access to perform services.
>
> **9.2 Vendor will be responsible for controlling cards and keys and will pay replacement fee, if the cards or keys become lost or stolen.**
>
> Reach understands and agrees with the above statement.

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9.3 Vendor shall notify Agency immediately of any lost, stolen, or missing card or key.

Reach will notify WV DEP of the above occurs.

9.4 Anyone performing under this Contract will be subject to Agency's security protocol and procedures.

Reach understands and agrees with the above statement.

9.5 Vendor shall inform all staff of Agency's security protocol and procedures.

Reach will inform WV DEP of our security protocol and procedures.

10. VENDOR DEFAULT:

10.1 The following shall be considered a vendor default under this Contract.

10.1.1 Failure to perform Contract Services in accordance with the requirements contained herein.

10.1.2 Failure to comply with other specifications and requirements contained herein.

10.1.3 Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.

10.1.4 Failure to remedy deficient performance upon request.

Reach understands and agrees with the requirements in 10.1.

10.2 The following remedies shall be available to Agency upon default.

10.2.1 Immediate cancellation of the Contract.

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10.2.3 Immediate cancellation of one or more release orders issued under this Contract. Any other remedies available in law or equity.

Reach understands and agrees with the statements above in 10.2.

11. MISCELLANEOUS:

11.1 Contract Manager: During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

Contract Manager: Jonna Wilson, MSW, LCSW
Telephone Number: 800-950-3434
Fax Number: 804-782-9537
Email Address: Jonna.Wilson@reach-eap.com

Jonna Wilson will continue to be your primary contract manager responsible for overseeing your EAP services. Jonna is available during normal business hours to address any customer service or other issues related to your contract. Jonna has over 40 years of experience as a behavioral health professional, including 15 years providing employee assistance services. In her capacity as an EAP Specialist, Jonna has managed accounts, and provided direct assessment and training services to private businesses, government agencies, and educational institutions such as West Virginia State University. Jonna has been an EAP Specialist with Reach EAP for over five years and as such, provides assessments, short-term counseling, training and consultation and account management services. Jonna is also a trained and certified Critical Incident Management facilitator.

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Price Proposal

Included Services	Cost
Client Services: **1 – 8 (plus initial assessment) visit Employee Assistance Program for employees and eligible family members**	**$19.06 PEPY** **($1.58 PEPM)**
Supervisor and Life Coaching: Three (3) telephonic sessions with a licensed coach	**Included**
Eight (8) onsite trainings hours	**Included**
EAP Website Services: **Reach website access to EAP Orientation & Supervisor Training, and online access to EAP services**	**Included**
Work Life Web-based Service: for website-supported child & eldercare, health & fitness, emotional well-being, and substance abuse & recovery information & assistance	**Valued at $.60 PEPY** **($.05 PEPM)**
Work-Life Consultations, Resource and Referral Service: **This includes all of the features of the Daily Living, Child & Eldercare internet service with the addition of being able to speak directly on the phone with Workplace professionals**	**Valued at $2.30 PEPY** **($.19 PEPM)**
Legal & Financial Web-based Assistance: **Telephonic assistance and community referrals provided by legal & financial professionals** **Identity Theft Services: Option for either the Basic or Enhanced ID theft service that includes consultations with Fraud Resolution Specialists and**	**Valued at $.85 PEPY** **($.07 PEPM)**

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assistance with ID theft issues	
Wellness Services: **HRS – Health Risk Assessment-online assessments, Wellness Coaching. Website includes tracking tools, personal health information, wellness topics and training seminars. As well as, personal health** information, wellness calculators for exercise, weight management, smoking cessation, etc., and worksite program participation.	**Valued at $ 5.76 PEPY** **($.48 PEPM)**
Fee calculation:	
Number of Employees	**825**
EAP, Work-Life Web and Legal/Financial (same services as current contract) $19.66 PEPY x 825 employees	**$16,219.50**
EAP, Work-Life Web, Legal/Financial and Daily Living = $21.96 PEPY x 825 employees	**$18,117.00**
EAP, Work-Life Web, Legal/Financial Daily Living, and Wellness Services = $27.72 PEPY x 825 employees	**$22,869.00**

Price Guarantee Our quoted per capita fee is a firm fixed price that is guaranteed to remain level for a total initial contractual period of up to three (3) additional years. DEP has the option to terminate in writing within 30 days without cause.

These prices and services can be extended to any West Virginia agencies.

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Reach Supervisor Training Manual
Table of Contents

Reach EAP
as an Employee Service

Reach Employee Assistance Program provides services for employees and household family members. Reach assists employees and their family members in resolving job-related, personal, and family problems. There is no cost to the employee for EAP services.

EAP Service Providers – All Reach EAP providers are masters-prepared, clinically trained social workers, psychologists, or counselors; and/or licensed or license-eligible in their professional discipline to practice within their state.

Short-Term Problem Resolution – Short-term problem resolution covers family issues, substance abuse, psychological and relationship issues, general/critical incident stress, and job-related issues. Reach EAP also provides assistance in referrals and locating resources that address legal, financial, vocational, and child and elder care needs.

Access to Services – Reach EAP has a network of counselors located near the employee's worksite or home. To access these services, an employee or family member is requested during intake to provide demographic information and a brief description of the problem for which they are seeking assistance before scheduling an appointment.

Referral – Should a referral to a community resource be required, the Reach EAP provider will facilitate the referral. These resources include but may not be limited to support groups, behavioral health professionals, physician, hospital, or other necessary services or supports. Once referred, the employee will be responsible for any cost involved with these services. The Reach EAP provider will assist the employee in utilizing their health insurance plan. Most issues are resolved using the EAP or through referrals made by the EAP.

Confidentiality – Privacy is the foundation of the EAP. To ensure privacy, Reach EAP provides services off-site. Additionally, Reach EAP & Workplace Solutions adheres to all state and federal laws pertaining to confidentiality.

Early participation in an EAP should be encouraged before an employee's personal problem has a negative impact on job performance, attendance, or behavior. Historically, 90% of employees utilizing an EAP participate on a voluntary basis, while supervisors and managers refer 10%. When a supervisor makes a supervisory referral, the supervisor will be advised if the employee attended EAP appointment(s) and if he/she complied with EAP's recommendations.

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Reach EAP
as a Supervisory Tool

Supervisory Tool – Research shows that 25% of the workforce experiences personal problems that often get in the way of job productivity. As a supervisor, you are in a key position to identify and to motivate employees to seek assistance when they are experiencing problems that interfere with satisfactory job performance.

People are an organization's most valuable resource. Reach EAP is designed to help you keep that resource functioning at its optimal level. An EAP is a comprehensive supervisory support system that helps make a supervisor's job a little easier by focusing on issues and problems that affect your employees' overall job productivity. In fact, you may find that the EAP is one of the most effective management tools available to you.

The ultimate goal of the EAP is healthier, happier, and more productive employees whose lives are in proper balance and whose work output meets your expectations.

Telephone Consultation – A supervisor may call Reach EAP confidentially to discuss any concerns or questions about managing difficult situations or employee issues.

Face-to-Face Consultation – As a supervisor, you may wish to consult with a Reach EAP staff in the office to discuss difficult situations or employee issues.

Supervisory Training – Reach EAP will conduct supervisory training at the worksite.

EAP Referral – Reach EAP will work closely with supervisors and Human Resources representatives to coordinate the referrals of valuable employees whose personal problems may be affecting their job performance, attendance, or behavior. Reach EAP protects employees' rights to confidentiality and privacy.

As a supervisor, you may think that it is your responsibility to handle or to resolve your employees' problems. You may believe that you will be helping an employee by not addressing the problem and will be hurting the employee by making a referral; in fact, the opposite is true. You may also believe that a referral to the EAP is somehow an admission of your failure as a supervisor. Only by not making every effort to improve the morale and productivity negatively impacted by an employee with a performance problem will you not be fulfilling your supervisory responsibilities. In situations where an employee has a performance problem, be alert to the possibility of an underlying personal problem.

Effective Supervisory Skills

1. List the expectations your organization has of its supervisors:

   _____

   _____

   _____

2. In order to do an effective job, you and those you supervise need the following four components:
   - **Healthy Environment** – physical, emotional, supportive
   - **Effective Tools** - problem-solving focus to do the job
   - **Training** – technical interpersonal skills – recognize learning styles
   - **Well-being** – know available resources (i.e., EAP, organizational supports)

3. Basic Communication Skills
   a. Ways we communicate
   - tone of voice = 60% of communication
   - facial expression/body language = 30% of communication
   - words = 10% of communication

   b. Problems in communication
   - Not talking directly about problems
   - Not listening to others
   - Misunderstanding or misinterpreting what is being said

   c. Prevention works best
   - Establish relationships – understand what makes employees tick (i.e., their likes and dislikes)
   - Handle problems as they arise
   - Understand the most powerful motivators
     1. Security
     2. Economic well-being
     3. Sense of belonging
     4. Recognition
     5. Control over one's life

   d. Speak for a purpose
   - Speak to be understood – put yourself in the employee's shoes.
   - Speak when calm, not emotionally charged.
   - Focus on the problem, not the person.

   e. Ask for ideas to solve a problem.

   f. Say something positive about the employee.

4. Establish and consistently communicate performance and behavior standards:
   a. Tangible (i.e., on time, accuracy, speed):

   _____

   _____

   b. Intangible (i.e., cooperative, courteous, enthusiastic)

   _____

   _____

The Employee Assistance Program

A Supervisory Tool

Employee's Personal Experiences		Supervisor's Observations of Performance Patterns		Supervisor's Actions
Lack of skills		Inconsistent job performance		Performance Counseling
Situational crisis		Poor judgment		
Job dissatisfaction		Confusion		
Structural job problem		Excessive sick leave		Disciplinary Action*
Immaturity	Causes	Implausible reasons for sick leave	Results In	
Substance abuse				
Family tensions		Irritability		Referral to Reach EAP
Emotional problems		Tardiness		
Untreated physical or medical issues		Temper tantrums		
		Poor relations with co-workers		
		Requests for pay advances		

REMEMBER: A referral to the EAP is no substitute for disciplinary action.

The Chemically Dependent Employee's Work Performance Deterioration

Substance Abuse Behavior	Ability to Do Job	Response to Crisis	Observable Indicators
Early Stage: ♦ Preoccupation with use ♦ Increased tolerance ♦ Using to feel better ♦ Lying about use ♦ Memory lapses	90%	♦ Reprimands from supervisor	Attendance problems: ♦ Late arrival/leave early ♦ Absent from worksite ♦ Absent on Mondays or Fridays Overall behavior: ♦ Complains of feeling bad ♦ Complaints by co-workers Job performance: ♦ Disorganized ♦ Misses deadlines ♦ Frequent mistakes ♦ Decreased quality and productivity
Middle Stage: ♦ Sneaking and denying use ♦ Feeling guilty ♦ Hangovers ♦ Withdrawals ♦ Loss of other interests ♦ Change in pattern of use ♦ Failed efforts to control use ♦ Prefers to use alone ♦ Mixing substances	75% 50%	♦ Family problems ♦ Financial problems ♦ Repeated reprimands or warnings from supervisor ♦ Legal problems ♦ Disciplinary actions ♦ Serious family problems ♦ Serious financial problems	Attendance problems: ♦ Frequent absenteeism ♦ Tardiness Overall behavior: ♦ Undependable, inconsistent, mood swings ♦ Avoids others ♦ Argumentative ♦ Borrows money ♦ Accidents on the job ♦ Frequent minor injuries Job performance: ♦ General deterioration ♦ Inconsistent productivity ♦ Lack of concentration ♦ Decreased quality
Late Stage: ♦ Physical deterioration ♦ Moral deterioration ♦ Lowered self-concept ♦ Persistent remorse ♦ Fixation on use ♦ Thinks job interferes with use	25%	♦ Final warning from supervisor ♦ Termination of employment ♦ Treatment or death	Attendance problems: ♦ Prolonged unexplained absences Overall behavior: ♦ Uses in the workplace ♦ Totally undependable ♦ Repeated hospitalizations ♦ Visible physical deterioration Job performance: ♦ Far below acceptable levels

The Supervisor's Role

An important function of the supervisor is to clearly identify job performance standards for employees, to monitor their performance, to identify when performance is declining, and to set appropriate goals for improved performance.

The Management Cycle

```
Take Action          →          Monitor
Steps as
Needed
   ↑                                ↓
Evaluate the    ←    Document –
Situation            Positives and
                     Negatives
```
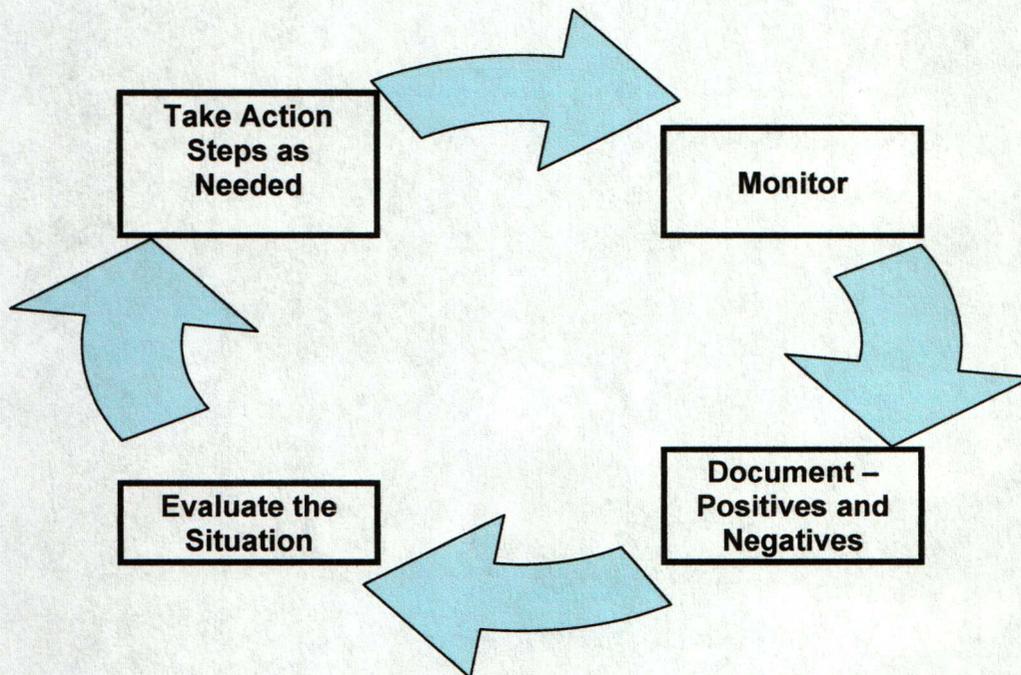
Your role as a supervisor is to focus on job performance. Supervisors are responsible for detecting and attempting to correct unsatisfactory job performance. It is your job to identify troubled employees early and to motivate them to accept help. It is not your role to help the employee cover up his/her problem, nor is it your role to be his/her counselor. Supervisors should not attempt to diagnose substance abuse or dependence, emotional issues, or other problems. An employee with a problem affecting his/her job performance should not have his/her job security or promotional opportunities jeopardized by a request for help. If an employee approaches you with a personal problem and there are no job performance concerns, encourage the employee to contact Reach EAP as a self-referral.

Action Steps with Problem Employees

Identifying Problem Employees

Just because you may not see a problem does not mean it is not there. Use this checklist to understand if you may have someone who may be causing subtle problems.

1. Are you aware of any employee who may have a problem that is affecting his/her job performance?   Yes   No

2. Are you secretly worried about a certain employee in your department?   Yes   No

3. Have you expressed your concerns to anyone about a certain employee?   Yes   No

4. Have others expressed their concerns to you about a certain employee?   Yes   No

5. Close your eyes and visualize each employee in your department. Do you think your department would run more smoothly if a certain employee was not there?   Yes   No

Reach EAP staff are available for consultation to help you determine whether and how to refer an employee to EAP.

Checklist for Identifying Troubled Employees

Repeated or continuous patterns of performance deterioration in a number of the following areas may indicate that an employee is troubled.

Absenteeism
- [ ] Unauthorized leave
- [ ] Excessive sick leave
- [ ] Monday/Friday absence
- [ ] Repeated absence of 2-3 days
- [ ] Repeated absence of 1-2 weeks
- [ ] Excessive tardiness
- [ ] Leaving work early
- [ ] Peculiar or increasingly improbable excuses for absences

Difficulties in Concentration/Confusion
- [ ] Work requires great effort
- [ ] Job takes more time
- [ ] Hand tremors when concentrating
- [ ] Frequent daydreaming
- [ ] Details often neglected
- [ ] Undependable
- [ ] Difficulty in recalling instructions clearly
- [ ] Increasing difficulty in handling complex tasks
- [ ] Difficulty in recalling own mistakes
- [ ] Forgetfulness
- [ ] Reduced awareness of what is going on
- [ ] Unable to keep current

On-the-Job Absenteeism
- [ ] Away from job more than it requires
- [ ] Frequent trips to break room or restroom
- [ ] Long breaks
- [ ] Physical illness on the job

High Accident Rate
- [ ] Accidents on the job
- [ ] Accidents with/to equipment
- [ ] Accidents off the job affecting work performance
- [ ] Frequent trips to medical department

Communication
- [ ] Less communicative than in past
- [ ] Unclear or imprecise communication
- [ ] Argumentative with co-workers and/or supervisors

Abnormal Behavior
- [ ] Arriving or returning to work in an obviously abnormal condition
- [ ] Conspicuously abnormal actions on the job

Lowered Job Efficiency
- [ ] Missed deadlines
- [ ] Mistakes or bad decisions
- [ ] Inattention or impaired judgment
- [ ] Wastes materials
- [ ] Carelessness
- [ ] Lowered output
- [ ] Overly dependent on others
- [ ] Improbable excuses for poor performance

Sporadic Work Patterns
- [ ] Quality of work differs from time-to-time
- [ ] Alternating periods of very high and very low productivity

Initiative
- [ ] Unwillingness to change work responsibilities
- [ ] Unwillingness to change ways of doing job
- [ ] Needs constant supervision or extra help

Interpersonal Skills
- [ ] Overreacts to real or imagined criticism
- [ ] Constant complaints to associates and/or supervisor
- [ ] Complaints from co-workers
- [ ] Wide swings in morale
- [ ] Borrows money from co-workers
- [ ] Avoids old friends or colleagues
- [ ] Avoids supervisor, especially after breaks
- [ ] Avoids making eye contact with others
- [ ] Overly critical of others
- [ ] Makes unreliable or untrue statements

Physical Symptoms
- [ ] Bloodshot eyes
- [ ] Disorientation
- [ ] Difficulty focusing
- [ ] Change in pupils
- [ ] Excessive talkativeness
- [ ] Slurred speech
- [ ] Incoherent speech and/or thoughts
- [ ] Coordination problems
- [ ] Atypical muscle movement (i.e., tremors)
- [ ] Sweating
- [ ] Runny nose
- [ ] Bloody nose

Documenting Performance,
Behavior, and Attendance Problems

Why do you document?
- To maintain an accurate record of observed changes in an employee's job performance
- To identify patterns of behavior
- To have accurate information to support your actions in the event of any adverse legal actions
- To retain an accurate accounting of events – time has a way of brushing over the past.

When do you document?
- Documentation is an ongoing process.
- Documentation includes positives as well as negatives.
- Documentation regarding performance issues begins at the first sign of problems.

What do you document?
- Job performance standards
- Positives of performances, as well as negatives
- Day, time, and place of observed behaviors that have negatively impacted job performance
- Your action at the time of the observed behavior
- Only the facts – *do not diagnose* the employee or make assumptions about possible causes or contributors to the employee's behavior

How do you document?
- Complete your company's documentation form or the Supervisor Documentation Form. (See page 13 for sample.)
- Clearly state the problem.
- Note if problem is first occurrence or, if not, frequency of occurrences.
- Report if a policy is violated.
- Specify what action steps, including disciplinary action taken.
- Protect employee's confidentiality.
    - Keep all documentation separate from general files or personnel records.
    - Maintain all documentation in a locked file.
    - Assign a code or number to the record instead of using employee's name.
    - Use a confidential coding system to record incidents. For example:
        - Color-code timesheets to reflect tardiness or absences.
        - Mark you calendar with a code or letter.
        - Protect computer files with a confidential access code.

Documentation Examples

Situation:
On Tuesday, Susan arrived ten minutes late to work. When she arrived, her hair was not combed and her clothing was not neat. One week later, Susan missed one-half day of work reporting that her alarm did not go off. Again, she appeared disheveled.

Documentation Examples:
Inappropriate Documentation
On Tuesday, Susan was late for work because she went out the night before and drank too much. She had a hangover. One week later Susan missed a half day at work because she was drinking all night.

Appropriate Documentation
Employee Name: Susan Smith
Date/Time: 05-13-16, 2:30pm   Location: Supervisor's office

Description of incident: Susan did not report to work as scheduled on this date. She presented to work at 11:30am, reporting her alarm did not go off. On 05-05-16, Susan arrived 10 min late for work.

Observations (including employee's behavior and physical appearance): On both instances, Susan's appearance was disheveled; her hair was not combed and her clothing was untidy and not pressed.

Other individual(s) present: None

Negative consequences in the workplace as a result of incident(s): Susan's teammate from another department was reassigned to cover Susan's responsibilities as receptionist. Teammate lost time from her regular tasks.

Employee's recent attendance: Other than incidents noted, no recent issues.

Employee's recent job performance: Recent job performance has been satisfactory.

Did incident involve a violation of policy? ☒ Yes   ☐ No If yes, which policy? Susan did not call supervisor re: delayed report to work.

Action(s) taken by supervisor: Supervisor counseled Susan on policy violation and impact on teammate. Written warning issued.

Action(s) necessary to resolve current problem: Susan will call supervisor or designee if she will be more than 5min late to work.

Expected timeframe(s) for resolution or improvement: Susan will demonstrate immediate improvement. Future incidents may result in further corrective action.

Referral to EAP

When To Consider a Referral to Reach EAP & Workplace Solutions
When you have observed a change in an employee's job performance, monitoring the individual is essential.

A referral to Reach EAP & Workplace Solutions is appropriate when:

♦ the employee has performed satisfactorily in the past (baseline);
♦ standard supervisory interventions have not been effective;
♦ the employee has exhibited a downward trend in job performance, attendance, and/or behavior; and/or
♦ the employee has violated company policy.

Presenting the Supervisory Referral to the Employee
When you make the decision to refer an employee to Reach EAP & Workplace Solutions, remain focused on the job performance issues. Avoid diagnosing any personal problems or get involved in any detailed discussion with the employee about his/her personal problems. Refrain from moralizing. There is no stigma attached to personal problems. Do not apologize for bringing up performance deficiencies. Remember that, as a supervisor, you have the right and responsibility to do so.

The Supervisor's Role in a Supervisory Referral
♦ Make sure all issues are well documented.

♦ Consult with your Human Resources Department and your Reach EAP Contract Manager or EAP Specialist prior to making a referral.

♦ Complete the Reach EAP Supervisor Referral Form. (See pages 15-16.) Review the referral form with the employee and ask the employee to sign the form. If the employee declines to sign the form, please note this. You and your HR Representative should also sign the form.

♦ Fax the completed and signed referral form to the Reach EAP Call Center at

♦ Your Reach EAP Contract Manager will notify you and/or your Human Resources Department when the employee contacts the EAP.

♦ At the time of assessment, the employee will be asked to sign an authorization to release information to you pertaining to his/her attendance at EAP sessions and compliance with recommendations.

♦ Reach EAP staff will provide regular updates regarding attendance and compliance. Reach EAP staff will also be available to you for consultation during the course of EAP services.

Testimonials

Just wanted to take a moment to thank you for facilitating today's Four Principles of Permanent Weight Loss session.

Our Reach EAP trainer was a wonderful and knowledgeable presenter, and did a great job connecting with our staff in practical ways to improve their success on the subject.

Thank you again for everything.

In response to a CISD for a plane crash - I felt it went well with a few actually opening up, and for me that is a good sign.
Thanks for your quick response. A quick response like this has been noted. Again, thanks.

In regards to on-site support after the suicide of a co-worker, "having a Reach staff member on-site at the last event was extremely beneficial and our staff appreciated the support."

Thank you for conducting the manager's workshops today on Training and Motivating. I think all of your points were spot-on and very timely as we head in to our 2017 season.   I apologize it was a little hectic leaving with the other meeting started but you'll be happy to know at the 3pm meeting, our General Manager asked "Give me some take-aways from your training today" and there were lots of good comments. Additionally, I had a few folks email and stop me in the hallway to tell me they thought the information was helpful. You really connected with our group – informative and enjoyable which is always a win!

The evaluations also repeat the positive sentiments.   I appreciate having you as a partner and we'll look forward to having you back at the club!!!

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EXHIBIT A

EMPLOYEE ASSITANCE PLAN

Item	Description	Unit of Measure	Unit Cost	Qty	Extended Cost
1	**Employee Assistance Program Per Specifications Attached**	**MO**	**$2.31PEPM**	**12**	**$27.72 PEPY**
				Total Bid	**$22,869.00**

WV-10
Approved / Revised
12/16/15

State of West Virginia
VENDOR PREFERENCE CERTIFICATE

Certification and application is hereby made for Preference in accordance with *West Virginia Code*, §5A-3-37. (Does not apply to construction contracts). *West Virginia Code*, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the *West Virginia Code*. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

1. **Application is made for 2.5% vendor preference for the reason checked:**

☐ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

☐ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification;

☐ Bidder is a resident vendor partnership, association, or corporation with at least eighty percent of ownership interest of bidder held by another entity that meets the applicable four year residency requirement; **or,**

☐ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or,**

2. **Application is made for 2.5% vendor preference for the reason checked:**

☐ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

3. **Application is made for 2.5% vendor preference for the reason checked:**

☐ Bidder is a nonresident vendor that employs a minimum of one hundred state residents, or a nonresident vendor which has an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia and employs a minimum of one hundred state residents, and for purposes of producing or distributing the commodities or completing the project which is the subject of the bidder's bid and continuously over the entire term of the project, on average at least seventy-five percent of the bidder's employees or the bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years and the vendor's bid; **or,**

4. **Application is made for 5% vendor preference for the reason checked:**

☐ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or,**

5. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**

☐ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or,**

6. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**

☐ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with *West Virginia Code* §5A-3-59 and *West Virginia Code of State Rules*.**

☐ Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) rescind the contract or purchase order; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: _Reach EAP, LLC_   Signed: _Dara Hiatt_

Date: _6/13/17_   Title: _Director of Business Development_

Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

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

Doc Description: Addendum 1- Employee Assistance Services

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2017-06-12	2017-06-14 13:30:00	CRFQ 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:

Reach EAP, LLC
100 N. Pennsylvania Avenue
Wilkes Barre PA 18701
1-800-950-3434

FOR INFORMATION CONTACT THE BUYER

Jessica S Chambers
(304) 558-0246
jessica.s.chambers@wv.gov

Signature X   _Dana Stacy_   **FEIN #**   81-4310213   **DATE**   6/13/17

All offers subject to all terms and conditions contained in this solicitation

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 601 57TH ST SE CHARLESTON WV 25304 US	ENVIRONMENTAL PROTECTION 601 57TH ST CHARLESTON WV 25304 US

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Employee Assistance Services	0.00000			

Comm 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.

Applicable Addendum Category:

[ ]   Modify bid opening date and time

[ ]   Modify specifications of product or service being sought

[✓]   Attachment of vendor questions and responses

[ ]   Attachment of pre-bid sign-in sheet

[ ]   Correction of error

[ ]   Other

Description of Modification to Solicitation:

Addendum issued to publish and distribute the attached documentation to the vendor community.

1. Answer the technical questions received.

No other Changes.

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.

Addendum Numbers Received:
(Check the box next to each addendum received)

[X] Addendum No. 1   [   ] Addendum No. 6

[   ] Addendum No. 2   [   ] Addendum No. 7

[   ] Addendum No. 3   [   ] Addendum No. 8

[   ] Addendum No. 4   [   ] Addendum No. 9

[   ] 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.

Reach EAP, LLC

_____
Company

Dana Skatt

_____
Authorized Signature

6/13/17

_____
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.
Revised 6/8/2012

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

MANDATE: Under W. Va. Code §5A-3-1Oa, no contract or renewal of any contract *may* be awarded by the state or any of its political subdivisions to *any* vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code§ 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. *Va. Code* §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt *OJ* employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: _Reach EAP, LLC_

Authorized Signature: _Dan Hiatt_   Date-: _6/14/17_

State of _North Carolina_

County of _Forsyth_ , to-wit: _Dana Hiatt_

Taken, subscribed, and sworn to before me this _14_ day of _June_ , 20_17_

My Commission expires _September 7_ , 20 _19_.

AFFIX SEAL HERE _BRITTANY MOTE / NOTARY PUBLIC / FORSYTH COUNTY, NC_

NOTARY PUBLIC- _BMote_

Purchasing Affidavit (Revised 08/01/2015)

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Jonna Wilson, Account Manger
_____
(Name, Title)

Jonna Wilson, Account Manger
_____
(Printed Name and Title)

Medical Office Building South, 331 Laidley Street, Suite 504, Charleston WV 25322
_____
(Address)

800-950-3434   /   804-782-9537
_____
(Phone Number)/ (Fax Number)

Jonna.Wilson@reach-eap.com
_____
(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Reach EAP, LLC
_____
(Company)

Dana Hiatt   Dana Hiatt, Director of Business Development
_____
(Authorized Signature) (Representative Name, Title)

Dana Hiatt, Director of Business Development
_____
(Printed Name and Title of Authorized Representative)

6/13/17
_____
(Date)

800-950-3434   / 804-782-9537
_____
(Phone Number) (Fax Number)

Revised 04/07/2017

Reach EAP
Seminar Descriptions

ALCOHOL & DRUG AWARENESS

FOR EMPLOYEE
This presentation will identify the signs and symptoms of drug and alcohol abuse and dependence. It will illustrate symptoms commonly seen in the workplace and negative consequences that occur in regards to job performance.

FOR SUPERVISORS
This presentation identifies the signs and symptoms of drug and alcohol and what types of symptoms may occur in the workplace. It will illustrate the costs of substance abuse to the workplace, provide tools to identify a "Troubled Employee," and identify resources for This seminar will also provide supervisors with an overview of "The Role of a Supervisor" and tips on confrontations.

ASSERTIVENESS TRAINING

This presentation looks at the difference between passive, aggressive, and assertive communication. Assertiveness is defined as expressing your thoughts, feelings, and needs while respecting the thoughts, feelings, and needs of others. This is a very effective form of communication but is often difficult for people. This training looks at the benefits of assertiveness and helps people learn how to be more assertive in their work and personal situations.

BALANCING WORK & FAMILY LIFE

As life grows more complex, what is truly important and fulfilling for us often falls by the wayside. In this timely, fun and interactive one-hour training, you'll learn deliberate strategies for simplifying your life including clarifying the values and beliefs that shape your priorities, removing obstacles to living a simpler life, practicing the ten commandments of clutter, streamlining chores and commitments and cultivating supportive relationships.

COMMUNICATION SKILLS

How could better communication skills impact your work and personal relationships? Often, we forget the essential communication basics that dramatically impact our ability to relate to and influence one another. This seminar addresses both verbal and nonverbal communication, as well as passive, assertive and aggressive communication styles. Participants will discuss positive and negative communication approaches, as well as practice skills to improve communication, listening and effectiveness with others.

CONFLICT MANAGEMENT

This seminar explores the types and sources of conflict that may occur in the workplace. Conflict resolution, anger and its management, giving and receiving criticism, and addressing problems that conflict creates are parts of this presentation.

CUSTOMER SERVICE EXCELLENCE

This presentation explores the top characteristics of excellent customer service. Communication styles are addressed, as well as appropriate ways to handle difficult situations in customer service. Dialogues and role-plays are utilized in order to give participants a hands-on approach to practicing good customer service.

DEALING WITH DIFFICULT PEOPLE (Dealing with Difficult Patients)

Difficult behaviors and people can test our patience and impact our ability to provide exceptional customer service. Build your confidence and customer service skills by becoming aware of types of difficult people and creative ways to respond positively to them. Participants will learn how to improve their communication, as well as handle anger and confrontations through education, interaction, and hands-on practice.

DEPRESSION IN THE WORKPLACE

This presentation addresses situational vs. biological depression, the symptoms of depression, and the variety of treatment options. It normalizes depression as a very real, yet treatable illness and offers ways to respond to others dealing with depression and the impacts in the workplace.

DIVERSITY IN THE WORKPLACE

The goal of this seminar is to assist employees with the awareness, adjustment, and acceptance of different genders, ages, races, religions, cultures and positions within an organization. The seminar is presented in a large group format with practical exercises for employee participation. Content includes explaining culturally different forms of non-verbal communication; distinguishing between myth and reality about culturally diverse groups; how eye contact, personal space and touching differ between cultural groups; as well as brainstorming about the impact of gender and age difference between employees. Participants will be able to identify benefits of overcoming biases, as well as the consequences of maintaining stereotypes.

EFFECTIVE MEETINGS

This seminar is aimed a making the most out of the large amount of time managers spend in meetings. Guidelines and the agenda are discussed in depth, as well as the types of problem participants you may encounter and how to deal with them.

EFFECTIVE PARENTING

Parenting is one of the most challenging jobs there is. Often times well meaning parents do not have the knowledge or tools to parent effectively. This training looks at what works when one is trying to train and discipline a child. The role of a parent is to train the child in good decision-making and how to be responsible for him or herself. This training presents techniques that are effective to achieve this goal.

EFFECTIVE SUPERVISORY SKILLS

Supervisors will learn the signs and symptoms of a troubled employee and develop the basic skills of confrontation and making appropriate referrals to the EAP. This is a didactic presentation with group discussion.

EMOTIONAL INTELLIGENCE COMPETENCIES

This seminar is an overview of the social and emotional competencies that contribute to superior job performance, teamwork, and a healthy work climate. Competencies explored include some that focus on effective leadership skills and some that apply to everyone in an organization.

EMPLOYEE MORALE

In this presentation, the focus is on assisting supervisors in improving or maintaining high levels of morale among their employees. Morale is explored and discussed in terms of how it affects the "bottom line" in the workplace, negative consequences of low morale, what motivates employees, and the benefit of high morale. Suggestions will be offered that give specific techniques supervisors can use to raise the morale in their work environment.

EXECUTIVE (Holistic) HEALTH

This presentation addresses the psychological attitudes, lifestyle behaviors, and health practices for leading truly healthy lives, both on and off the job.

FINANCIAL STRESS MANAGEMENT

This seminar focuses on assisting individuals in understanding how to manage their finances. This topic will use tools and techniques adopted from the services of Consumer Credit Counseling that not only helps with the basics of financial planning but empowers participants to take charge of their financial lives.

GENERATIONAL DIVERSITY

This seminar identifies the generations currently in the workforce and describes the "personality" of each one. Also explored are the values, assets and potential liabilities to the workplace, their loyalty, and relationship to authority and to one another.

GIVING AND RECEIVING FEEDBACK

This presentation explores dealing with conflict, conflict resolution and interpersonal skills. There will also be provided a step-by-step "how to" on the ways to give and receive criticism with role plays and/or small group discussions on ways to maintain objectivity while finding appropriate solutions to conflict.

HANDLING MULTIPLE PRIORITIES

This seminar provides practical strategies to recognize real priorities, establish and meet deadlines, deal with unexpected and unplanned situations, and keep on track – all while staying calm, cool, and collected. This is a didactic seminar with group and individual activities.

HEALTHY RELATIONSHIPS

Our lives are full of relationships. This training looks at the different types of relationships; what do unhealthy relationships look like; and what is a healthy relationship and how do I have one?

HOLIDAY STRESS

When the holiday season approaches, stress levels can heighten with juggling demands, rising expectations and practical concerns such as managing finances. This one-hour presentation addresses typical holiday stresses including grief, excited children, extended families and in-laws, as well as competing demands, traditions and finances. Participants will increase their awareness of holiday traps and treasures, identify their holiday priorities, and learn essential planning ingredients in efforts to secure a more meaningful and peaceful holiday season.

HUMOR IN THE WORKPLACE

In this presentation, participants will learn the power of humor and ways to bring humor appropriately into the workplace. Interactive exercises will be utilized to involve participants in developing their own happy work environment.

IDENTIFYING THE IMPAIRED EMPLOYEE

This seminar is a more in-depth discussion of recognizing impairment than is provided in our Substance Abuse in the Workplace seminar. Symptoms, consequences, probable cause indicators, and the role of the supervisor are explored.

MANAGING CHANGE

This presentation is designed to assist companies and their employees in developing skills in coping with changes in the workplace relating the numerous issues that may impact an individual's job. The program will address the stages of grief and loss, appropriate management of anger, coping tips, and resources individual's can take advantage of to keep them from being a "Victim of Change."

PERFORMANCE COUNSELING SKILLS

This presentation provides an overview of the performance counseling process and offers practical suggestions for preparing for and conducting the evaluation.

PREPARING PSYCHOLOGICALLY FOR RETIREMENT

Any transition is going to come with stress, loss, and new possibilities. Most people don't like change but the way we think about it can really affect the experience from one phase of life to another. This seminar addresses some of the challenges and possibilities inherent in the retirement process and how to prepare to go through it successfully.

PREVENTION OF JOB BURNOUT

This presentation focuses on understanding the signs and symptoms of burnout are and strategies to adopt to prevent burnout.

RESPECT IN THE WORKPLACE

This seminar defines respect and disrespectful behavior. It focuses on what to do to engender respect from others and be respectful to others in the work environment.

SETTING AND ACHIEVING GOALS

Feeling aimless or frustrated by a lack of or too many goals? Too often our own personal and professional goals fall by the wayside as we deal with the demands of our lives and of those in it. Through education and hands-on exercises, this workshop will help you to set and reach manageable goals, as well as prioritize your own needs in efforts to lead a more satisfying life.

SEXUAL HARRASSMENT AWARENESS

This seminar is designed to assist companies with educating their employees in regards to what sexual harassment is, the laws associated, and the possibly consequences of being involved with sexual harassment in the workplace.

SIMPLIFY YOUR LIFE

This seminar focuses on the overwhelming feeling that life is out of control with too much to do and no time to care for self. Concrete methods are offered to gain perspective on what is important, let go of what you do not need, and free you from energy and time draining activities.

STRESS MANAGEMENT

There are a number of topics incorporated under this general title that can be provided depending on the needs of the organization. The topics range from managing job stress to managing personal stress, to burnout prevention or preventing burnout for caregivers. This seminar utilizes a number of assessment tools and relaxation exercises.

TAKING CARE OF THE CAREGIVER

Balancing caring for others with caring for themselves is a great challenge of today's caregivers. Exhaustion, lack of support, guilt and frustration are some of the difficult feelings that arise as caregivers, often those of elderly parents, give loving and diligent care to others. Through discussion and education, this one-hour presentation provides strategies, resources and the support of others in similar situations to help caregivers to (believe it or not) "put themselves first". While an ongoing process, participants will gain a valuable reminder that best way to care for others is to care for them.

TEAM SKILLS

Topics covered range from being a team player, to how supervisors can facilitate team building in their departments, to practical exercises to enable participants to experience working within and developing teams among their coworkers. The dynamics of a team will be reviewed along with typical member roles and the difference between promoting vs. squelching teamwork.

TIME MANAGEMENT

This seminar is a didactic and group discussion of the many time wasters that cause individuals to mismanage time. It also provides tips for managing time wisely and utilizes assessment tools so participants can review specific problems with their time management skills.

WORKING FROM THE HEART

This seminar focuses on those thoughts, feelings and behaviors that result in our being happy with our lives and satisfied with our work. Those who adhere to these principles by and large avoid being overwhelmed, over-stressed, unhappy and unappreciated. It has to do with applying not only our heads, but also our hearts to our work. This seminar is based on the knowledge from organizational behavior that job satisfaction, positive morale and employee retention result from intangible factors such as being heard, being valued, mutual trust, being recognized and rewarded for outstanding job performance, and having opportunities to grow professionally.

SKILL BUILDERS

Appreciating Personality Differences

Why is it that we seem to click with some people and not with others? The ability to identify your own personality style and that of others can increase your effectiveness on the job. This session will discuss a variety of personality styles and strategies for communicating with each to create a more harmonious work environment. The objectives for Skill Builder include

- Explore different types of personalities.
- Understand individuals in organizations.
- Understand stress and conflict.
- Understand the role of communication.
- Create a collaborative environment.

Cultural Diversity in the Workplace

Every member of the workforce brings unique skills, background, and experience vital to the successful completion of the company productivity and service goals. Diversity brings to a workforce a rich source of creativity and problem-solving to help reach business goals. When you complete this Skill Builder you should be able to

- Discuss strategies for creating and maintaining an inclusive environment.
- Understand constructive ways to communicate with others.
- Identify methods for building respectful relationships.
- Provide tips for practicing cultural sensitivity among co-workers in the work environment.

Nobody Likes a Bully: Bullying in the Workplace

Bullying behavior can be recognized and addressed in an empowering, respectful manner. This seminar will examine examples of workplace bullying and the many types of behavior that can be defined as bullying. All involve a misuse of power with the intention to intimidate or put someone down. You'll learn about the impact of bullying on the employee—from an inability to focus or work productively to stress leading to physical ailments. You'll also understand the difference between bullying and appropriate disciplinary action in the workplace. The seminar will conclude with specific actions both you and the employer can take to minimize office bullying. You will have a clear understanding of the kind of behavior that constitutes bullying in the workplace and how to address it. This will help you to

- Recognize bullying behavior.
- Understand the impact of bullying, both on individual employees and on the organization.
- Recognize contributing factors.
- Identify steps and strategies to address bullying.
- Explore preventative measures.

Recognizing a Troubled Employee

Employee performance should be a major focus for all managers. At some point in your management career you are likely to experience/encounter at least one troubled employee. It is important that you know what to do and what not to do. This Skill Builder will discuss

- The difference between a troubled and a difficult employee
- The role of the manager in responding to a troubled employee
- Strategies to achieve positive results
- How to deal with a dangerous and troubled employee

Sexual Harassment Prevention in the Workplace

In this Skill Builder employees will learn the common effects of harassment and the legal ramifications involved with sexual harassment. The course will provide examples of sexual harassment behaviors and discuss ways to avoid acting in harassing ways. Additionally, general sexual harassment reporting procedures will be reviewed. The objectives for this course are to

- Increase overall awareness of all employees about forms of harassment in the workplace.
- Define sexual harassment and discuss examples of this behavior.
- Understand legal rights and appropriate procedures if harassed.
- Discuss common effects when harassed.
- Identify steps to conduct an effective investigation.
- Understand the prevalence and legal ramifications and costs of workplace harassment.
- Foster a harassment-free, respectful workplace.

Accountability

Individually people must be accountable for their own performance, but managers must also be accountable for employees' performance. You must clearly define and express expectations in order for them to perform at the level that you want them on. You must also provide constructive feedback on a consistent basis with the intent to help improve performance. After completing this Skill Builder you should be able to

- Create a congruous workplace where employees contribute to the organization's mission.
- Identify barriers to employee productivity.
- Develop a plan to effectively communicate expectations.
- Discuss strategies to hold employees accountable in a way that motivates them and produces results.

Business Etiquette and Professionalism

For success in the workplace, it is helpful to identify the traits of professional behavior. You will examine a wide range of characteristics that can help you to succeed, from accountability and punctuality to respect for others. This Skill Builder will also focus on business etiquette, with an emphasis on effective communication and proper e-mail conduct. Finally, helpful tips will be provided for professional attire at work, as well as what constitutes a professional work attitude. By the end of this Skill Builder you should be able to

- Discuss the meaning of professionalism.
- Identify elements of professionalism.
- Apply the basic rules of communication in the workplace, including e-mail etiquette.
- Provide tips for appropriate attire in the business setting.
- Discuss professional temperament, work attitude, and spirit.

Drug-Free Workplace Compliance

Substance abuse can be a sticky subject to deal with, especially when it is spilling over into the workplace. It is a necessary topic, though, and therefore must be discussed. Many employees struggle with alcoholism and substance abuse due to personal troubles. In addition to impacting the employee, substance abuse can have a number of negative consequences on others in the workplace, including severely compromising the safety of employees. This Skill Builder will help you to

- Recognize the impact of substance abuse on the workplace.
- Identify signs and symptoms of substance use.
- Define reasonable suspicion.
- Deal with employees who have job performance problems that could be related to alcohol and other drugs.
- Understand supervisor responsibilities.

Effective Communication

The ability to effectively communicate with others is one of the most powerful tools for personal and professional success. Most people are challenged by the many day-to-day interactions with coworkers, family, and friends. Emotion, communication, and conflict are present in all human interactions and affect each of us in different ways. Everyone manages emotion, communication, and conflict from habit—patterns and styles developed early in life and over time. In this Skill Builder you will learn how to more effectively communicate in both personal and work situations. Specifically, by the end of this Skill Builder, you should be able to

- Explain the importance of effective communication.
- Examine listening skills and learn ways to become an effective listener.
- Discuss ways to overcome barriers for effective communication.
- Raise awareness of personality and individual differences that affect communication.
- Develop an awareness of your personality and communication tendencies.

Self-Care: Remaining Resilient

Learn to identify ongoing symptoms of stress and how to find a more healthy approach to the demands of work and home. Reconciling the demands of work and home life can be a source of constant tension. As a result, sleep disturbances, appetite changes, headaches, poor concentration, and irritability are common signs of too much stress. In this timely Skill Builder, you will learn to identify emotional and physical symptoms of stress, assess your own life balance situation, and learn practical techniques to bring balance to your work and personal life. You will learn to

- Recognize the physical and emotional signs of stress.
- Assess your own life balance situation.
- Reduce the stress of transitioning from home to work.
- Create an effective family unit.
- Implement time management skills.
- Become mindful of the benefits of self-care.

Emotional Intelligence for Success

Learn the benefits of recognizing feelings in yourself and others, managing emotions, and balancing thoughts and feelings. These traits are associated with emotional intelligence" and can improve the chances of leading a successful life. This Skill Builder will examine the impact of emotional intelligence at home and at work, as well as brain research on emotions and the battle between the emotional brain and the thinking brain. You will have the opportunity to learn ways to increase your emotional quotient (EQ). By the end of this Skill Builder you should be able to

- Understand the importance of emotional intelligence
- Discuss how the brain can hijack your emotions
- Implement strategies to manage your emotions
- Increase your emotional quotient by applying calm breathing, focused listening, and empathy

Estate Planning: Five Essential Documents

This Skill Builder will cover five essential documents that will help you and your family to be better prepared financially, legally, and emotionally by guiding you through the basics of estate planning. You will understand the difference between wills, guardianships, and trusts. This Skill Builder will also provide tips on identifying the best financial advisor so that you can reach your personal/financial goals while minimizing taxes.

By the end of this Skill Builder you should be able to

- Identify the five important documents that you should have ready
- Understand the basics of estate planning, will planning, guardianships, and trusts
- Apply tips for identifying the best financial advisor
- Discuss the importance of communicating your wishes and desires to family members and other individuals

Maximizing Your Day: Effective Time Management

Does the day seem to fly by and you haven't accomplished a thing on your to-do list? If time management is so easy to accomplish on our own, then why do we all feel overwhelmed? Time management is a learned skill. It requires self-discipline and a desire to become conscious of how you manage your daily activities. This Skill Builder will provide a basic explanation of the time management process as well as a myriad of suggestions to assist you with effectively managing your time.

By the end of this Skill Builder you should be able to

- Explain the time management process
- Provide characteristics of effective time managers
- Understand the importance of prioritizing important events
- Explore the role of delegation and communication with others

Caring For Ageing Relatives

Learn how to determine the best level of care for an aging relative. As relatives age, they may require more care than family members or neighbors can provide. Many younger relatives then face the difficult decision of seeking the right kind of outside care, and some individuals may be unwilling to accept that they require additional care. In this Skill Builder, you will gain a better understanding of how to determine the most appropriate level of care for your aging relative, as well as how to communicate more productively about care options, from in-home assistance to assisted living and nursing care.

By the end of this Skill Builder you should be able to

- Observe and assess your loved one's activities of daily living (ADLs)
- Involve your aging relative and other family members in the decision-making process
- Ask the right questions and observe the environment closely so that the best quality of care and lifestyle is selected for your loved one
- Stay fully involved if the individual is settling into a new living situation

The Art of Conflict Resolution

Conflict is inevitable. In this Skill Builder, you will explore a variety of conflict types and approaches, as well as consider how to effectively communicate with others who use a conflict-management style that is different from your own personal method. By knowing effective communication techniques to use in conflict situations, you can enhance your ability to resolve conflict.

By the end of this Skill Builder you should be able to

- Realize why conflict is inevitable
- Connect conflict management styles with a variety of personality types
- Understand how to resolve conflicts better

- Recognize the importance of active listening
- Apply effective communication strategies

Eating Your Way to Wellness

We always hear about having healthy eating habits; however, many diet plans have warned us to stay away from particular food groups or eliminate certain things from our meals. This Skill Builder focuses on the USDA Food Plate and provides tips and resources on how to eat your way to better and long-lasting health.

By the end of this Skill Builder you should be able to

- Understand methods of choosing and preparing healthy food
- Apply 11 tips for eating healthy on a budget
- Identify tips and resources to assist you in developing a plan for eating healthy

Say What You Mean the Right Way: Healthy Forms of Communication

We may understand on an intellectual level that communication is important, but how often do we take the time to evaluate the effect of our communication in our relationships? There are many ways to communicate how you feel to the people in your life. This Skill Builder will address how to deal with difficult circumstances and special situations. You will also explore how you can use communication to strengthen your relationships and to enhance mutual understanding.

By the end of this Skill Builder you should be able to

- Identify barriers to clear communication
- Apply tips for effective communication
- Assess effective ways for dealing with difficult conflict
- Recognize ways to maintain successful family relationships

EAP AND WORK-LIFE UTILIZATION

SAMPLE COMPANY

Report Period: 01 January 2016 - 31 March 2016

Report Run Date: 27 April 2016

TOTAL UTILIZATION FOR THIS PERIOD   **2.35%**

01 January 2016 - 31 March 2016

Executive Summary

Sample Company's overall usage of services during the period, 01 Jan 2016 to 31 Mar 2016, was 281 cases. The projected annual utilization for Sample Company is 9.43% which is greater than BOB's benchmark of 5.94%. There were 219 EAP counseling cases, and 62 work-life cases. Usage is higher compared to the previous year during this time period where utilization was 0.02%. Year to date the number of cases broken out by gender are: 43.18% male and 56.55% female. 0.27% of callers declined to provide this information.

The executive summary provides
- Total number of cases for the reporting period
- The projected annualized utilization (note this is the only place within the report where projected utilization appears)
- The projected annualized utilization compared the EAP's overall utilization.
- Number of counseling vs work-life cases
- If there is past data available, the summary will also compare use from last year at the same time. If there is no past data then the this is be a 0%
- Breakdown users for the reporting period by gender

Utilization is calculated by EAP and Work-life cases ÷ population x 100

Projected Utilization is calculated with the following formula: Utilization for the Period ÷ Total number of days in that period x 365 x 100

NUMBER OF PARTICIPANTS: 11960

	PERIOD COUNT	YTD COUNT	UTILIZATION %	YTD UTILIZATION %
Clinical	219	274	1.83	2.29
Work-life	62	85	0.52	0.71
Web Hits	703	805	5.88	6.73
Total	**984**	**1,164**		

Number of participants is based on most recent census provided
Period Count gives number of cases based on current report period
YTD Count currently gives real time data based on report run date **Utilization %** is based on current period
YTD Utilization % currently gives real time data based on the report run date
Total provides the number of cases and web hits for the reporting period and real time data based on the report run date

CASES BY MONTH

Clinical ▮ Work Life ▮
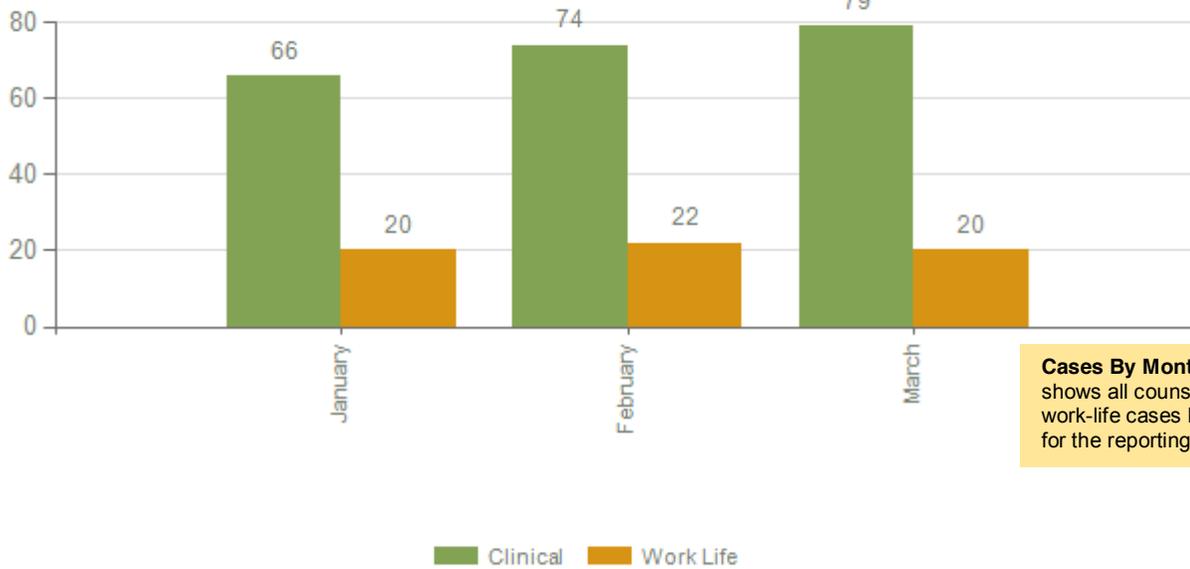
Cases By Month Graph shows all counseling and work-life cases by month for the reporting period

UTILIZATION % BY MONTH

UTILIZATION % ▮ BOB benchmark ▬
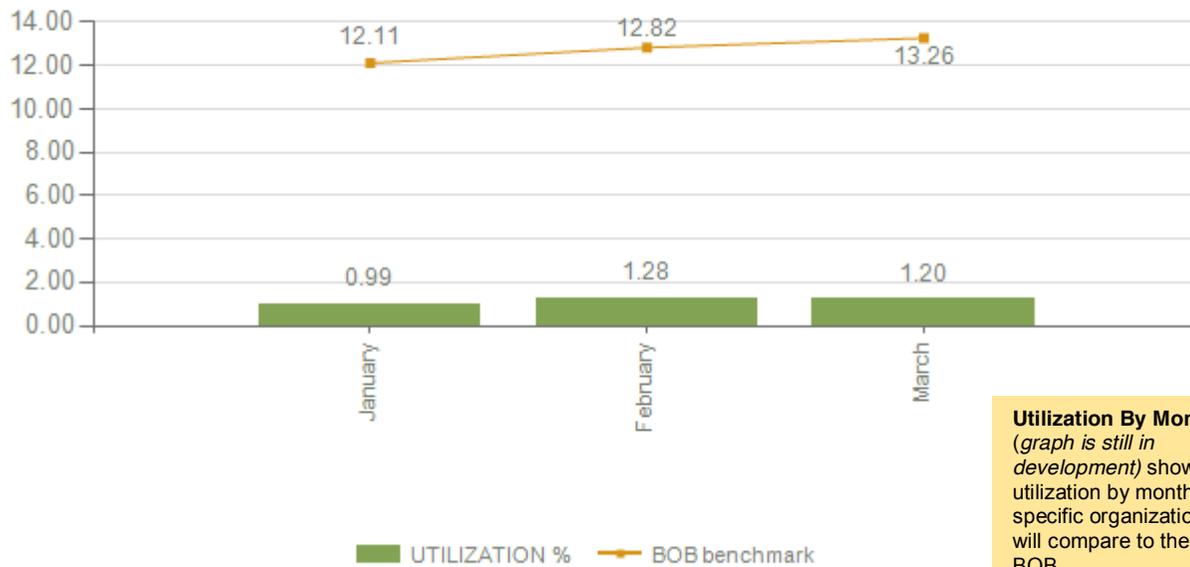
Utilization By Month (*graph is still in development*) shows utilization by month for the specific organization and will compare to the EAP BOB.

	Q1	Q2	Q3	Q4	YTD
Clinical					
Face to Face Counseling	160				198
Long Term/Psychiatrist Referral	22				34
Structured Telephonic Counseling	17				17
Clinical First Call Resolution	12				16
Sub Total	211				265
General Assistance					
General Assistance Clinical	159				195
General Assistance Work-life	25				35
Sub Total	184				230
Work-Life					
Legal In Person	12				15
Elder Care	6				11
Daily Living	7				9
Legal Advice	7				8
Financial	4				6
Elder Care List	1				1
Sub Total	37				50
Employer Services					
Formal Manager Referral	5				5
Manager Consultation	3				4
Sub Total	8				9
Total	**440**				**554**
Total Utilization	3.68				4.63
Web Logins	117				132
Number of Individual Participants Utilizing Services	250				307
Web Usage % (Based on Logins)	0.98				1.1

Clinical section lists the type of support provided and number of counseling cases

General Assistance calls are call that do not result in a counseling or work-life case. **General Assistance Clinical** calls are listed on this overview page but are not counted in the utilization on the previous page. **General Assistance Work-life** calls are counted in the utilization on the previous page

Work-Life section lists the types and number of work-life cases

Employer Services are services that support the organization vs just an individual

The **Q1 Total** is the number of all cases including those not counted in the utilization for the reporting period. The **YTD** total is the number based on the report run date. **Total Utilization** gives the utilization for all cases listed above including those not part of traditional utilization. **Web Logins and Web Usage%** are listed for those wanting to use Web login data vs Web hits which are featured on the utilization overview

*Please note that the General Assistance Clinical service and First Serve cases are not included in utilization, but are reported in the case counts above.

This section details information that is collected from the participant during the initial call. Some participants may decline to answer these questions.

AGE BAND	Q1	Q2	Q3	Q4	TOTAL	%
Undisclosed	24				24	8.54
Adult (18-30)	34				34	12.10
Adult (31-40)	79				79	28.11
Adult (41-50)	65				65	23.13
Adult (51-60)	61				61	21.71
Elderly (>60)	17				17	6.05
Unknown	1				1	0.36
Total	281				281	

GENDER	Q1	Q2	Q3	Q4	TOTAL	%
Male	133				133	47.33
Female	147				147	52.31
Undisclosed	1				1	0.36
Total	281				281	

CLIENT TYPE	Q1	Q2	Q3	Q4	TOTAL	%
Employee	224				224	89.60
Significant Other	16				16	6.40
Dependent	6				6	2.40
Family Member	2				2	0.80
Manager	2				2	0.80
Total	250				250	

MAIN ISSUES

MAIN ISSUES OVERALL

Category	Value
Clinical	211
Work-Life	37
General Assistance	25
Employer Services	8

Axis: 0, 53, 106, 159, 212

CLINICAL ISSUES

Category	Value
Clinical	211
Employer Services	8

Axis: 0, 71, 142, 213

WORK-LIFE ISSUES

Category	Value
Work-Life	37
General Assistance	25

Axis: 0, 13, 26, 39
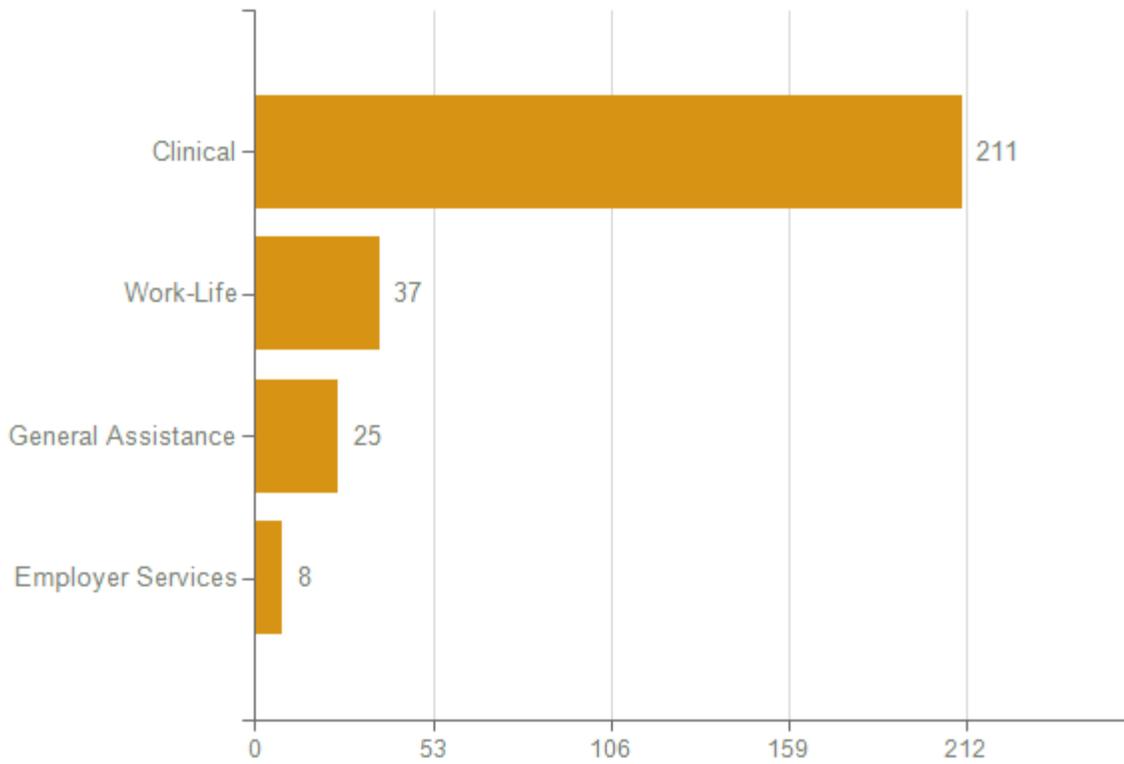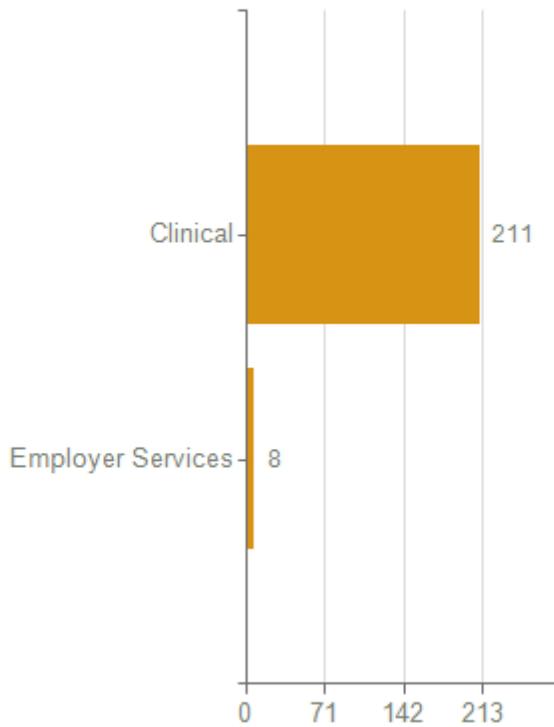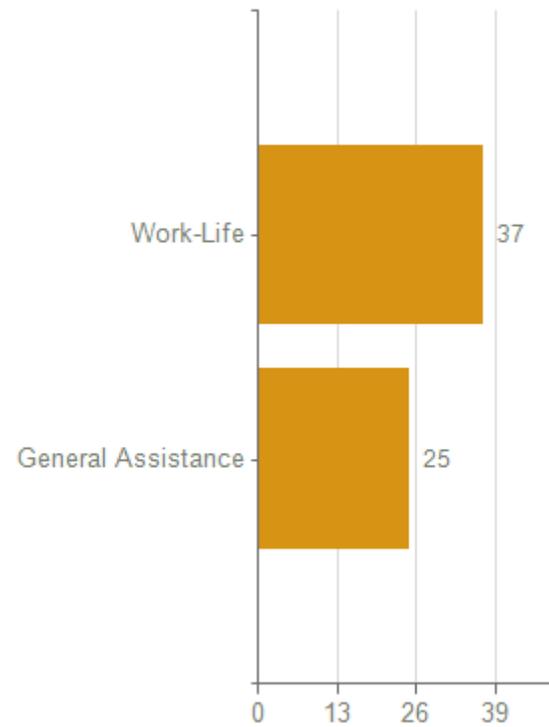
CLINICAL CASES BY CATEGORY

	Q1	Q2	Q3	Q4	TOTAL	%
Face to Face Counseling						
Family/Relationship Concerns	77				77	35.16
Emotional Health	56				56	25.57
Grief/Loss	11				11	5.02
Workplace Concerns	8				8	3.65
Adjustment/Change	7				7	3.2
Addiction Concerns	1				1	0.46
Sub Total	160				160	73.06
Long Term/Psychiatrist Referral						
Emotional Health	13				13	5.94
Family/Relationship Concerns	5				5	2.28
Adjustment/Change	3				3	1.37
Grief/Loss	1				1	0.46
Sub Total	22				22	10.05
Structured Telephonic Counseling						
Emotional Health	9				9	4.11
Family/Relationship Concerns	6				6	2.74
Grief/Loss	1				1	0.46
Workplace Concerns	1				1	0.46
Sub Total	17				17	7.77
Clinical First Call Resolution						
Emotional Health	4				4	1.83
Family/Relationship Concerns	4				4	1.83
Adjustment/Change	2				2	0.91
Workplace Concerns	2				2	0.91
Sub Total	12				12	5.48
Formal Manager Referral						
Addiction Concerns	5				5	2.28
Sub Total	5				5	2.28
Manager Consultation						
Employee Behaviour/Attitude	1				1	0.46
Employee Performance Issues	1				1	0.46
Employee-Related Conflict	1				1	0.46
Sub Total	3				3	1.38
Total	219				219	

This section details participants' responses to a questionnaire that is asked during the assessment and captures if the issue is personal or work related and allows participants to select from a list of concerns. Participants can select more than one concern

Personal Concerns

	Q1	Q2	Q3	Q4	TOTAL	%
Stress	93				93	28.88
Anxiety/panic	74				74	22.98
Low mood	40				40	12.42
Anger Issues	24				24	7.45
Difficulty concentrating	24				24	7.45

Work Related Concerns

	Q1	Q2	Q3	Q4	TOTAL	%
Workplace Stress	24				24	44.44
Work performance issues	12				12	22.22
Conflict at Work	10				10	18.52
Career change/Transition	3				3	5.56
Workplace bullying/harassment	2				2	3.70

This section details how the participant learned of the service. The graph will list up to the top 10 most common
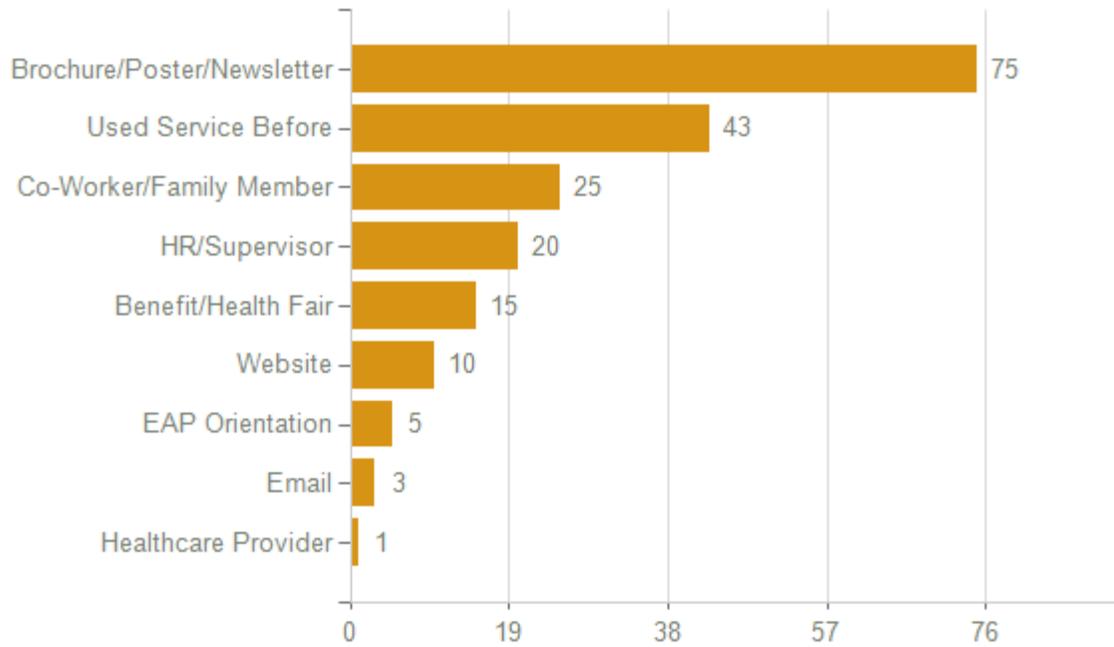
	TOTAL	PERCENTAGE
Brochure/Poster/Newsletter	75	38.07
Used Service Before	43	21.83
Co-Worker/Family Member	25	12.69
HR/Supervisor	20	10.15
Benefit/Health Fair	15	7.61
Website	10	5.08
EAP Orientation	5	2.54
Email	3	1.52
Healthcare Provider	1	0.51
Total	**197**	

METHOD OF CONTACT

This section details the modality the participant used to get connected to the service
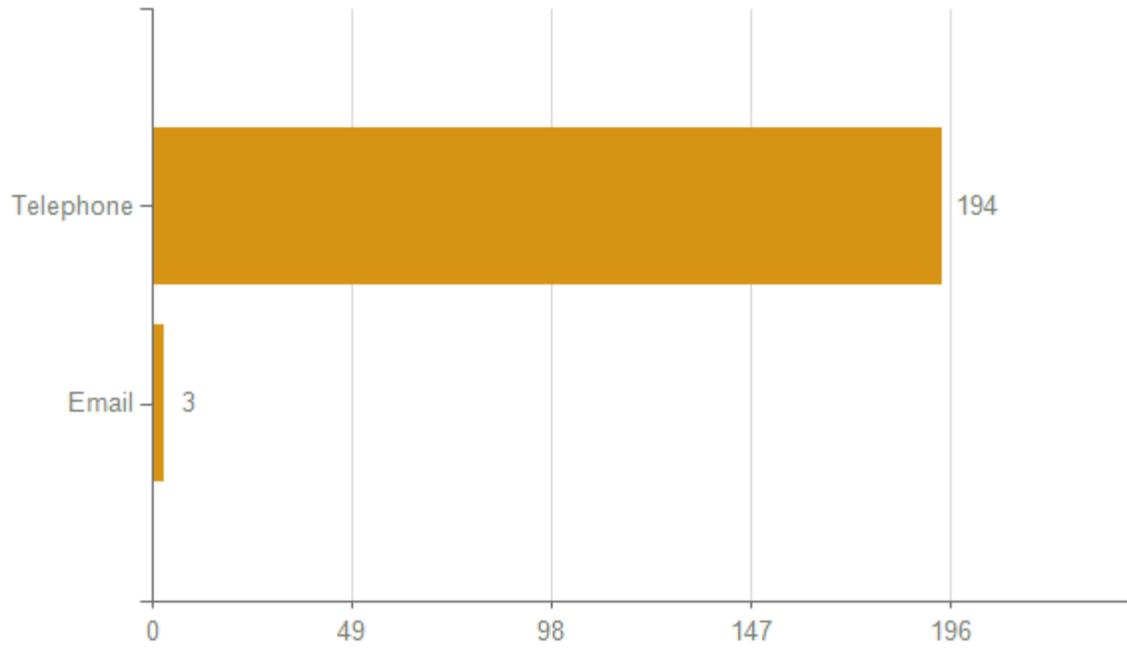
	TOTAL	PERCENTAGE
Telephone	194	98.48
Email	3	1.52
Total	**197**	

	Q1	Q2	Q3	Q4	TOTAL	%
General Assistance Work-life						
Overview	16				16	25.81
Benefit Connect	6				6	9.68
User Response Requested	3				3	4.84
Sub Total	25				25	40.33
Legal In Person						
Divorce	3				3	4.84
Power of Attorney	2				2	3.23
Wills & Estate Planning	2				2	3.23
Bankruptcy	1				1	1.61
Child Support/Child Custody	1				1	1.61
Legal Miscellaneous	1				1	1.61
Real Estate	1				1	1.61
Restraining/Protection	1				1	1.61
Sub Total	12				12	19.35
Daily Living						
Housing	3				3	4.84
Health/Wellness	2				2	3.23
Miscellaneous	1				1	1.61

General Assistance Work-Life are calls where the participant received support however the support did not result in a referral. These calls are counted as cases and are included in the utilization

Legal In Person are referrals to meet face to face with an attorney. The types/counts of legal referrals are detailed.

Daily Living are referrals that all referrals that do not fall into dependent care or legal/financial referrals. This is a broad category thus not all referrals will be specifically identified and may fall under the miscellaneous category

Social Services	1	1	1.61
Sub Total	7	7	11.29

Legal Advice

Civil	2	2	3.23
Credit & Debt Issues	2	2	3.23
Auto Accident	1	1	1.61
Legal Miscellaneous	1	1	1.61
Real Estate	1	1	1.61
Sub Total	7	7	11.29

Legal Advice are telephonic consultations with an attorney. The types/counts of legal referrals are detailed.

Elder Care

Aging Life Care Professional	1	1	1.61
Area Agency on Aging	1	1	1.61
Financial Assistance	1	1	1.61
Home Care	1	1	1.61
Senior Center	1	1	1.61
Transportation	1	1	1.61
Sub Total	6	6	9.66

Elder Care are referrals that have to do with the care of an elderly person. The types/counts of referrals are detailed.

Financial

Financial Miscellaneous	2	2	3.23
Budgeting	1	1	1.61
Debt	1	1	1.61
Sub Total	4	4	6.45

Financial are referrals/consultations that have to do with the support finances. The types/counts of referrals are detailed.

Elder Care List

Transportation	1	1	1.61
Sub Total	1	1	1.61
Total	**62**	**62**	

Elder Care List are lists of referral options that have to do with the care of an elderly person. The types/counts of referrals are detailed.

Home Legal Ready Docs Financial Legal Relationships Mental Health Pets Training and Development Child Care Families Effective Manager Kids' Well-Being Communication Parenting Personal Growth

WEBSITE UTILIZATION

	Q1	Q2	Q3	Q4	TOTAL
Homepage					
Home	330				330
Seminars	7				7
Search	4				4
Sub Total	341				341
Living					
Legal Ready Docs	66				66
Financial	54				54
Legal	50				50
Pets	15				15
Travel and Leisure Time	6				6
Errands Online	2				2
Safety	2				2
Consumer Tips	1				1

Home Buying or Selling	1	1
Home Improvement	1	1
Sub Total	198	198
Balancing		
Relationships	30	30
Mental Health	25	25
Families	12	12
Communication	7	7
Personal Growth	7	7
Grief and Loss	1	1
Sub Total	82	82
Parenting		
Child Care	12	12
Kids' Well-Being	10	10
Parenting	7	7
Education	6	6
Developmental Stages	3	3
Sub Total	38	38
Working		
Training and Development	14	14
Effective Manager	10	10
Accomplished Employee	5	5
Career Development	4	4
Workplace Diversity	3	3
Sub Total	36	36
Aging		
Housing Options	2	2
Caregivers	1	1
Planning the Future	1	1
Sub Total	4	4
Thriving		
Adolescents' Health	4	4
Sub Total	4	4
Total	**703**	**703**

Report Terminology Glossary

Overall Utilization:
> Utilization is calculated by EAP and Work-life cases ÷ population x 100
>
> Projected Utilization is calculated with the following formula: Utilization for the Period ÷ Total number of days in that period x 365 x 100

Clinical:
> Counseling cases that may include face to face, structured telephonic, video, on-line, first call resolution/in the moment support

cCBT (Computerized Cognitive Behavioral Therapy):
> Self-paced program whereby participants interact with the application on a weekly basis, and to monitor their own perception of how they are functioning in terms of personal well-being, close family relationships, work, and social roles

RRCI (Rapid Response Critical Incident):
> On-site support following a traumatic event

Work-Life:
> Consultation and/or referrals for community resources

Web Hits:
> Recorded each time a user moves from section to section on the website

Web Logins:
> Recorded each time a participant logs in to the website. These can include multiple logins by the same participant

Management Consultation:
> A consultation with a manager to assist in development of management skills or to assist with how to handle a particular situation with an employee or within the organization

Number of Individual Participants Utilizing Services:
> Number of unique individuals accessing services

Knowledge of Service:
> How participants identified they learned about the service

Method of Contact:
> Provides a breakdown for the reporting period of how participant accessed the service

General Assistance: Categorizes the General Assistance Inquiries into the reason why outreach by a participant did not result in a case

> **User Response Requested:**
> The participant makes contact with the service center, but fails to provide enough information to complete an intake and therefore more information is being requested

> **EAP Overview:**
> The participant receives an overview of the services available, and the contact does not result in the client requesting service

> **Benefit Connect:**
> The participant is seeking a service that is not administered through the EAP/work-life program, so is connected to the correct resource

First Serve:
> When it is unknown if the participant is eligible for services however initial support is provided

LiveConnect:
> Instant messaging that is accessible via the website. Allows participant to request services without making a phone call

Workplace Activities:
> Provides a chart, a summary, and a list of all services for the reporting period provided in the client's workplace (onsite counseling, benefit fairs, webinars, etc.)

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2017 CALENDAR

EMPLOYEE SUPPORT PROGRAM

	Monthly Theme	**Monthly Online Seminar*** *For clients with Advantage Complete or Enhanced Web	**Online Seminar Description** — Online seminars can be found on your home 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 17th	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 21st	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 18th	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.
MAY	**#HAPPINESS** Creating support environments for children	**Raising Well-Adjusted Kids** Available on demand starting MAY 16th	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 20th	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 18th	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 15th	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.
SEP	**TMI** Find your way to the right resources	**Information Overload** Available on demand starting SEP 19th	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.
OCT	**ENERGY BOOST** An active approach to well-being	**Improve Your Health With Ergonomics and Frequent Movement** Available on demand starting OCT 17th	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 optimal 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 workplace.	**Diversity in the Workplace: Maintaining an Inclusive Environment** Available on demand starting DEC 19th	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.

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Family Mealtime—
FAMILY UNITY

Family mealtimes are becoming a thing of the past. Don't let this happen to your family! Research has shown that the family mealtime is an important ritual that ties a family together and makes it stronger. Make it a priority for your family. Most families will have to restructure their schedules to begin this tradition, and it may not happen every evening, but if your family decides that it is valuable, it just may grow into a regular event. The important thing is to begin. Set a date that the whole family can come together for a meal.

It is usually the evening meal that families are able to come together to eat. If you are beginning a new tradition, take the time to make it special. Turn the television off, put on some soft music, set a pretty table, and even light a candle occasionally. This helps to show your family that you value them and that this time together is important. Involve the family in the planning and preparation of the meal. Young children especially love to be involved, and it helps prepare older children for the time when they will be taking care of themselves. A bonus for the whole family is the likelihood that the foods you eat during your family dinners will be healthier than those grabbed on the run.

10 TIPS
for Green Spring Cleaning

It's that time of year again — time to get down and dirty with a thorough spring cleaning. Our homes have been shut up all winter and most are in need of some freshening. This year, give your house a green spring cleaning by avoiding dangerous chemicals and harsh cleaners. There are healthier ways to do it — for you and the environment.

Did you know that indoor air pollution in our homes can be as much as 100 times worse than outdoor air pollution? Most of that pollution comes from the evaporation of VOC's (volatile organic compounds) or the "offgas" from cleaning supplies, air fresheners, and home decorating items like paint, wallpaper, and carpeting. While we think we're cleaning and disinfecting our homes, we're really loading the air with toxic chemicals.

10 TIPS FOR GREEN SPRING CLEANING

1. Open the windows. The best way to get dirty air moving out and fresh air moving in is to open the doors and windows. Feel the breeze.

2. Skip the air fresheners. Chemical fresheners can cause eye, skin, and respiratory irritation. Aerosol air fresheners are even worse — the tiny air-borne particles can damage nerves and lodge in your lungs. Buy fresh flowers in lieu of traditional air fresheners. An open box of baking soda, cedar blocks, and dried flowers also add natural fragrance to the room.

3. Use vegetable-based cleaning products instead of harsh chemical cleaners. Vegetable-based cleaners, like those made with coconut oil, are becoming more popular every day. Even the makers of Clorox have a vegetable-based cleaning line on the market. Choose vegetable-based dishwashing detergent too. (I just learned that traditional dish detergent is made from petroleum. If every family replaced just one 28 oz. bottle of petroleum-based dish detergent with a vegetable-based product, we could save 82,000 barrels of oil.)

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8. Use natural fiber sponges and rags to do the cleaning. Avoid using paper towels and other one-time use tools.

9. Skip the antibacterial soap. It's just not necessary. The widespread use of antibacterial soap is also leading to antibiotic-resistant strains of bacteria.

10. When you make the switch to natural cleaning products, be sure to safely dispose of any dangerous chemical products. Don't pour them down the drain, into the ground, or into the trash. Read the labels or check with your waste management provider for options.

U.S. Environmental Protection Agency (EPA). (n.d.). In Teaming up to save energy: Protect our environment through energy efficiency. Retrieved August 16, 2016, from http://www.energystar.gov

Hutto Texas Website. (Updated 3/18/11). *10 tips for green spring cleaning*. Gardner, A. Retrieved October 2, 2016, from http://www.huttotx.gov/documentcenter/view/1451.

10 TIPS
for Green Spring Cleaning
continued from page 1

4. Vinegar, vinegar, and more vinegar. Nature's cleaning miracle, vinegar can be used to clean just about anything. Use it straight to clean kitchen floors or wash windows, mix it with baking soda and essential oils to clean sinks, and even use it to remove stains in your carpet.

5. Get some baking soda too. Multi-purpose baking soda can be used for everything from freshening the air, carpet, or furniture to scrubbing the toilet and tub.

6. Don't use bleach or any cleaners containing chlorine. The problems with chlorine bleach are numerous — it can burn skin and eyes and prove fatal if swallowed. When it goes down the drain, it becomes toxic to the natural world too. An herbal-based sanitizer or one by Seventh Generation is a good alternative, as is just plain old hot water and soap. White vinegar also works wonders. (see #4)

7. Skip the harsh chemical cleaners in the bathroom. Make that porcelain sparkle with non-chlorine bleach cleaners or white vinegar and a baking soda-water paste. (See #5)

Family Mealtime—
FAMILY UNITY
continued from page 1

The meal doesn't need to be fancy. It isn't the food that makes the time special; it is the reconnecting that occurs among the members of the family during this time they have set aside. Use this time to share the important things that have happened in the life of each family member during the day. Empathize with one another and offer support where it is needed. Mealtime is an opportunity for lively conversation and learning. Talk about world events on a level that children can understand. Help your children learn the fine art of conversation. Tell your life's stories and share your values. Teach good table manners by example.

Throughout history, the purpose behind eating meals has been more than just to relieve hunger. Meals have provided a time to gather with the community and fellowship together. Consider your family, no matter how large or small, as your most important community, and make some great memories as you sit down to share regular meals with those you love.

Workplace Options. (Reviewed 2016). *Family mealtime—Family unity*. Raleigh, NC: Author.

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CHOOSING a Camp

Summer is nearly here. If you are considering camp as an option for your child, these steps can help you find the camp that is the right fit for your child.

STEP 1

Before agreeing to send your child to summer camp, answer these questions:

- What do we expect our child to accomplish/experience at camp?
- Would a day camp, resident camp, or a travel camp be best?
- What length of time do we want for this camping experience?
- How much money do we want to spend?

STEP 2

Choosing an appropriate summer camp is seldom as easy as picking the nearest one - so a little advance research is in order.

1. Camp Types and Duration

Day Camps ... are operated on a campsite for any part of the day, but less than 24 hours a day, usually for children from four to 12 years of age. Camp sessions usually operate four to eight hours per day and from four to 10 days per session. They may

be best for the young camper just beginning the camping experience.

Residential Camps ... operate at a permanent campsite for five or more days and nights and usually serve children from eight to 17 years old. Campers remain overnight. Camp sessions run from one week up to eight-week all-summer experiences. They may be best for a camper who has had a previous away-from-home experience.

Travel Camps ... move from one site to another, visiting various attractions along the way. Campers, usually adolescents, generally travel by canoe, horse, bicycle, boat or on foot. Previous camp experience is usually beneficial. Sessions may last from five days up to three weeks.

2. Camp Sponsorship

Knowing the camp sponsorship will help you determine the camp's philosophy and its population focus. Camps are privately sponsored, operated by youth serving agencies such as the Boy or Girl Scouts and by religiously oriented organizations. Some camps serve special populations such as children with learning disabilities or physical handicaps. Public and private schools, as well as governmental units, operate camping programs.

3. Camp Activities

Match the camp's activities to the child's needs and desires. A wide variety of activities make up the various camping programs. Campcraft, such as outdoor cooking, toolcraft and ropecraft, are common. High-adventure activities, including canoeing, sailing, waterskiing, archery, horseback riding, team sports, ropes courses, and swimming are out there to be enjoyed.

STEP 3

Identify several camps that seem to fit with your identified desires.

Not all camps need to be *licensed* . A program may call itself a camp and not be required to have a license because it does not fall under the definition of a camp as contained in the licensing law. A camp that is not licensed should not necessarily be disqualified. Before you choose to send your child to a non-licensed camp, you should ask the director about the quality of the program, safety, staffing, and health.

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Take My Stress PLEASE!

A lighthearted approach can help people stand up to life's challenges.

By Pati Nash

With the power to relieve stress, reduce anxiety and increase mental energy, laughter really is a darn good medicine. But we know that, right? Who hasn't tried to use humor to soften an adversary, calm an upset friend, or break the ice at a big event? But looking at the funny side is more than a crisis tool. Stress expert Loretta LaRoche sees it as a daily way of life. Behavioral Health Newsline explored her unique take on stress management in this Q&A.

Is there a difference between good stress and bad stress?

Oh yes. You need stress. It helps you manage your life and propels you to be successful. It even designates what is dangerous and what is not. That's why we have a fight-or-flight response. Because if you're on the highway and a car goes into your lane, you better well have a stress response.

So when does good stress become bad stress? When does it cross that line?

Think of the circus performer with the plates twirling on sticks. There comes a point when he's twirling too many plates and they start dropping. Or think of an instrument like a Stradivarius. When the strings are the right tension, it plays beautifully. But when they get too tight, you get a squeaky sound. The human body responds the same way. When it starts to feel overloaded, it starts to give you signals. You start to get physical responses. You may get heart palpitations or headaches, backaches and gastrointestinal problems. In other words, nothing seems to make you feel good. You start to feel irritable, you overreact.

And this is where stress management comes in. How can we manage our stress if we all need it?

One has to really be aware of his or her bodily responses. I think the problem is that sometimes people have actually forgotten what it means to be well; having a feeling of wellness. It's where you don't have aches and pains, you're able to get through the day with a lot of energy and you're getting good sleep. When you start to get the other signals, you have to step aside and say to yourself: "It seems to me like I'm out of control."

You believe humor is a major part of managing stress, but how can people who aren't as naturally funny as you bring humor into their lives?

When I say humor, I mean that humor as a kind of umbrella to hold over yourself to live a lighthearted life. You don't have to be a comedian. It's about putting on a lighter lens to see life with more clarity, rather than through a dark lens, which leads to feeling like you're in a vampire movie. So forget the comedy or being funny. What you really want to do is to take your life more lightly instead of seriously. Take your work seriously, take your life lightly.

Have you seen people do that successfully?

Oh yes. I think you see it once someone recognizes that life is not a stress rehearsal. You have to recognize that you are not immortal. You are not going to be here forever. What do you want to do with the time that you have? Do you want to spend eight hours of every day complaining, moaning and gathering forces around you to feel like a victim? Or do you want to take that time and make your day more joyful, more flexible, and easier on yourself and everyone around you?

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Take My Stress PLEASE!

You tell people that too often we make everything into catastrophes, that a wet towel on the bed is not a mugging.

I think one of the best ways to deal with this is to take five things that you feel are the worst possible things that could ever happen to you or your family and use those to put other things that stress you out in perspective. For example, if you have a child and that child was abducted and you never saw him again, how would that relate to your computer crashing? Take five things that really would create a crisis, like if you found out you only had 6 months to live. Would you be that concerned about your e-mail not coming in?

So how do people put that kind of perspective on things?

Put that list of five things on your desk. And take a look at them periodically when you're getting stressed and say, "Wow, this really isn't as important as I think it is." Because I always say yesterday's tragedy turns into today's comedy. How many of us have laughed over some incident that we initially thought was just so incredibly dramatic?

Why does life seem more stressful these days?

The fact that technology is created and obliterated so quickly creates a lot of stress. I learn a program and then I'm told six months later we are replacing that with a different program. Never before in history have we discovered and rediscovered things so quickly. I don't want to sound like I don't think we should move forward—we are never going to go back to my grandmother's time. But I think we have to blend the two. In the studies on stress, one constant appears over and over again. And that is without support from friends or families or coworkers—social support—you will become ill and die sooner. And loneliness and depression are at an all-time high in this society.

What does research tell us about stress?

If you keep triggering that response throughout the day, maybe several hundred times a day, you are going to get yourself into a pickle. Your body is going to become eroded by the toxicity of this response. This is when the body starts to break down. You get sick more often when your immune system is compromised by stress.

I've read that it is not major catastrophes in our lives that erode us but the little stresses that wreak havoc on us. Is that true?

Sure, it's like going through bramble bushes. You walk and you cut yourself here and you cut yourself there and pretty soon you go to bed and you have all these little pains and aches all over you and you are saying, "What happened?" Your whole body is full of cuts from the brambles. I think that's what happens during the day, and it's like a domino effect.

Do you recommend meditation for calming down?

Definitely. I tell people to spend 15 to 20 minutes a day just calming themselves, whether it is through meditation or even prayer. A lot of repetitive activities become meditative, like knitting or needlepoint.

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CHOOSING a Camp

Step 4

Talk to the camp director.

Camp staff are willing to answer questions and discuss the purpose and objectives of their program.

- Ask for references from previous campers.
- Ask about the camp's behavior management plan and visitation policy.
- Ask your neighbor, school counselor and church leader for their opinions.
- Visit the camp.
- Check the safety record of the camps under consideration.

Adapted from Michigan.gov. LARA Department of Licensing and Regulatory Affairs. *Choosing a camp* (nd). Retrieved October 2, 2016. http://www.michigan.gov/lara/0,4601,7-154-63294_27723-82314--,00.html

Take My Stress PLEASE!

And exercise is a wonderful way to reduce stress. If you get into a kickboxing class or an aerobics class, the repetition plus the activity stops the mind in its tracks. It is very hard to skip rope and make yourself crazy about the fax machine.

What are some good resources for stress management?

Books by David Burns or Albert Ellis. Davis Burns' classic is "Feeling Good, the New Mood Therapy." He's done wonders for depressed or anxious people. Counseling is also helpful. Go sit and talk to a party who is not involved in what you do. Because often what we do is we get people around us to validate our disturbing behavior. We say, "Don't you feel this way?" and they say, "Absolutely." And what we need is someone to say, "No, this is not how you are supposed to feel. This behavior is not serving you."

Nash, P. (Reviewed 2016). *Take my stress please!* Raleigh NC: Workplace Options.

May 2017

FrontLine Employee

Wellness, Productivity & You!

Will Gratitude Add to Your Life?

Thanks to research, the practice of having an attitude of gratitude is beginning to take its place alongside meditation, yoga, and mindfulness as a health practice with demonstrated value. Magazine articles, books, Web sites, diaries, greeting cards, and calendars all promote the attitude of gratitude. More than 20 gratitude-focused research studies have cataloged the health benefits of gratitude, including improved life satisfaction, vitality, hope, optimism, and reduced levels of depression and anxiety. Practicing gratitude is a conscious process that includes the intention of regular thankfulness (i.e., "Today, I am thankful for…" or "My favorite part of today was…") and training one's mind to see the good in any situation. Will it work for you?

Source: www.tandfonline.com [search "grateful experiences and expressions"]

Research:
Benefits of Beets
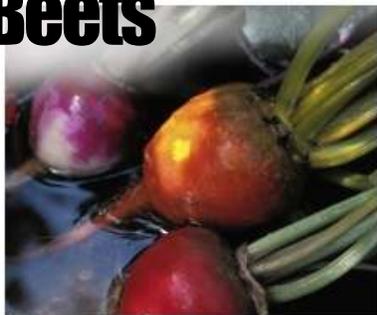
What we eat plays a major role in brain health and functional independence as we grow older. Wake Forest University researchers examined a group of older adults to determine the impact of drinking a beetroot supplement before working out. They discovered their brains performed more efficiently, mirroring the operations of a younger brain. Combining beetroot juice with exercise delivers even more oxygen to the brain and creates an excellent environment for strengthening the somatomotor cortex, which is the part of the brain involved in planning, control, and execution of voluntary movements of muscles.

Source: http://news.wfu.edu [search "beets"]

Media Violence and Aggression Link

Violent video games, television shows, movies, and their role in influencing and contributing to increased risk of violent or aggressive behavior are concerns many parents share. These fears can now be supported by research that shows the strong correlation of such media to increased violence. Other factors contributing to increased risk of violence by viewers were also studied. These included peer delinquency, peer victimization, gender type, neighborhood crime, and abusive parenting. Only one of these had more influence than media violence: violent peers. Although abusive parenting is a well-known risk factor for violence in adulthood, media violence has an even greater influence—it's more than twice as influential.

http://www.news.iastate.edu/news/2017/04/11/mediaviolence

Let Nature Rejuvenate You

New research shows that there are mental health advantages that come with spending time immersed in natural settings. Frequent technology use puts extraordinary strain on cognitive functions such as attention, problem solving, focusing, multitasking, and shifting between programs with different cognitive demands. Research indicates that exposure to natural settings seems to improve our ability to perform these tasks because of the restorative benefits offered by a radically different change of environment. A couple of days of downtime and communing with nature can give you a 50% boost in productivity!

http://www.plos.org [search "0051474"]

Getting Couples' Communication Unstuck
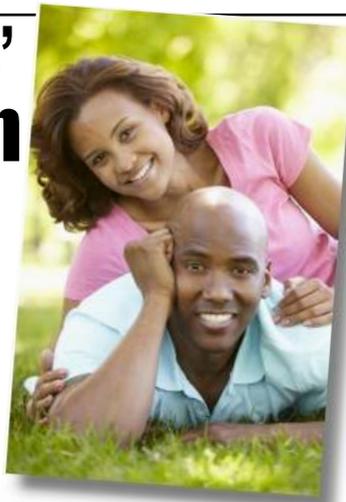
Communication problems are still the most commonly cited reason for separation and divorce, so don't let the frustration of communication problems linger too long in your relationship before taking steps to intervene. You can start by applying tried-and-true principles of effective communication. Although many communication strategies for reducing conflict and healing relationships exist, the following three are foundational and can help you experience almost immediate results: 1) Use "I" statements when talking about your feelings and your needs. Doing so instantly removes the blaming dynamic your partner responds to with defensiveness. 2) Listen without interrupting. This takes conscious effort, and it is a skill that comes with practice. So practice. It will be easier because of #1 above. 3) When your partner speaks, listen and validate what was said. The ability to paraphrase demonstrates the most appreciated and satisfying form of validation, but expect it to feel a bit awkward until it becomes a more natural part of your communication style. If these exercises don't work, then seek help from a professional counselor before throwing in the towel on your relationship. Counselors know how to apply communication strategies and can guide you through them and give you more to use in the future if needed.

# Find Work and Family Balance with "Shared Activities"

If you struggle to find balance between work and family, try "shared activity" as a strategy to help you feel less guilty and score some wins. While working in your office at home or doing chores (with the few precious hours you possess on the weekend), consider engaging your child in a way that combines the activity with one he or she can also do that allows them to be present with you. It's a myth that your child watching you work is a "negative" or that "finding balance" means it must always be play. Witnessing your work ethic can be powerfully influential. Many parents with demanding work schedules have mastered the art of exposing their children to their work by creatively allowing them to be close observers or even participate in some manner. Work and family balance is about testing and experimentation. Find fascinating strategies at pinterest.com by logging in free and searching "work family balance."

Getting Help for Anxiety

More than 40 million North Americans suffer from chronic forms of nervousness that interfere with their life. These are anxiety disorders, which are highly treatable forms of mental illness that can benefit from counseling, support, medication, or alternative therapies. If anxiety is interfering with your life or bothersome in ways that interfere with your relationships, your job, and your happiness, don't be a prisoner to the disabling condition. Anxiety can't be seen like a rash or a mole, but it is just as real, and it's not your fault. Failing to understand anxiety can lead you to suffer longer as you struggle to control its symptoms. This can contribute to additional stress and health problems like depression. Reach out and get proper help from mental health professionals through an insurance referral from your doctor or help from an employee assistance program.

How to Receive Criticism Well

Handling criticism well is a workplace skill you may never quite perfect, but there are ways to build emotional resilience to it. 1) Criticism doesn't mean you're wrong, but some truth probably exists. Search for it. 2) One complaint does not mean everyone feels the same way. 3) Criticism may originate from a reaction to only a small part of your work, not the entire effort. Don't discard what is working well. 4) Like the ring of a bell, the sting of criticism dissipates. Don't risk an improper reaction to it by responding immediately. Instead, wait for a few hours—or, even better, overnight—before reacting. 5) See criticism as a gift to improve your productivity and increase the value of what you do. 6) Label criticism as feedback, and thank those who offer it.
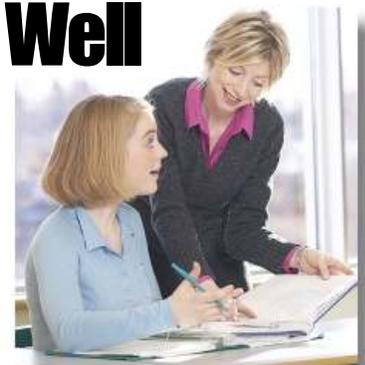
■ **My employee says she is thinking about quitting because she can't get along with her coworker. Should I send her (or them) to the EAP, or should I first try to resolve his problem myself? I am a little nervous about doing this right the first time. I don't want to lose her.**

Managers should first attempt to resolve conflicts between employees. Here's one approach: Ask this employee to share the history of the conflict with you, how it began, and what prompted her to come to you now. Ask what steps she has taken to resolve the conflict and why she believes they have not worked. Ask your employee about how she would like to proceed with a resolution, but anticipate making a decision to meet with both employees and play a leading role. This is important because for some employees, remaining in conflict is easier than the compromises necessary to resolve them. If you lose control of this process, change becomes optional. In this sense, employee conflicts are not solely personal problems, because they can always potentially affect the bottom line. Managers must shepherd them to a resolution. If a resolution does not appear forthcoming, involve the EAP to save time and to address hidden agendas or other unspoken issues underlying the conflict that may require ensuring confidentiality in order to properly address it.

■ **How can the EAP help me as a supervisor in developing and improving my relationships with employees**.

The success of the supervisory role is largely dependent on the effectiveness of relationships that you have with employees. An effective relationship allows you to play an influential role in maximizing the job satisfaction and productivity of your workers. There is more to achieving these goals than most supervisors realize. EAPs have resources and counseling skills, and they understand relationship dynamics that can help. Developing and enhancing emotional intelligence is the path to success, and EAPs can consult with you on ways to improve relationships and enhance them in specific ways--determining how to motivate employees, utilize their talents better, help them feel rewarded, and listen to and understand their needs. You want employees to be honest with you, open up, share their workplace struggles and their ideas, and tell you how they can best be utilized. All of this depends on your ability to be your authentic self, open up, exercise patience, and demonstrate vulnerability. These are relationship skills that EAPs' expertise can help you attain and develop.

■ **I am a new supervisor. What are the top complaints of employees**

A national 2015 Harris Poll was conducted that asked employees this question. Read about it in the Harvard Business Review online at hbr.org (search bar "top complaints"). These complaints, starting with the most

about supervisors? I plan to avoid all of them.

frequently cited, are not recognizing employee achievements, not giving clear directions, not having time to meet with employees, refusing to talk to subordinates, taking credit for others' ideas, not offering constructive criticism, not knowing employees' names, refusing to talk to people on the phone or in person, and not asking about employees' lives outside work. Keeping this list in mind, conducting a self-assessment, and working to champion all of them will produce more engaged and happier employees, reduce turnover, and play a role in helping your bottom line. The EAP can help you be a stronger performer in any of these areas where you think you fall short.

Other than spending a lot of time online, what are the workplace signs of an employee with an Internet addiction?

Internet addiction is not yet recognized as a psychiatric disorder, but those who struggle with it often suffer other forms of compulsive behaviors related to Internet use, like online gambling and gaming. You may not witness compulsive use of the Internet with an employee you supervise, but you can often see and measure consequences. These serve as the basis of the supervisor's referral of the employee to the EAP. You should anticipate an irregular cycle of improvement and a return to unsatisfactory performance as you begin to confront these problems. Compulsive use of the Internet is an insidious addiction that consumes time, which is a finite resource. This means other tasks and responsibilities must be left undone due to procrastination, purposely ignored, rescheduled, accomplished less frequently, or completely eliminated from the compulsive user's mental to-do list. These things could include assignments, organizing an office, paying bills, filing, emptying the trash, or even personal hygiene. Note that you may never associate these problems with Internet addiction, but you can still manage a problem employee who exhibits them.

■ Documenting employees who participate in subtle abuse or bullying behaviors is sometimes difficult because one can't describe what's being witnessed, like tone of voice, for example. In the end, it just sounds like one's opinion!

You are correct. Tone of voice is difficult to describe in documentation without being subjective, which may lead to its being dismissed by management as opinion. The way around this problem is to document reactions by the victim or others to the tone of voice. These effects are visible and therefore describable and measurable. Now you have something less refutable, not based on opinion. Several of these documented situations constitute a preponderance of evidence that supports the thrust of your documentation, which makes it useful for administrative purposes.

NOTES

Employee Support Program

YOUR EMPLOYEE SUPPORT WEBSITE
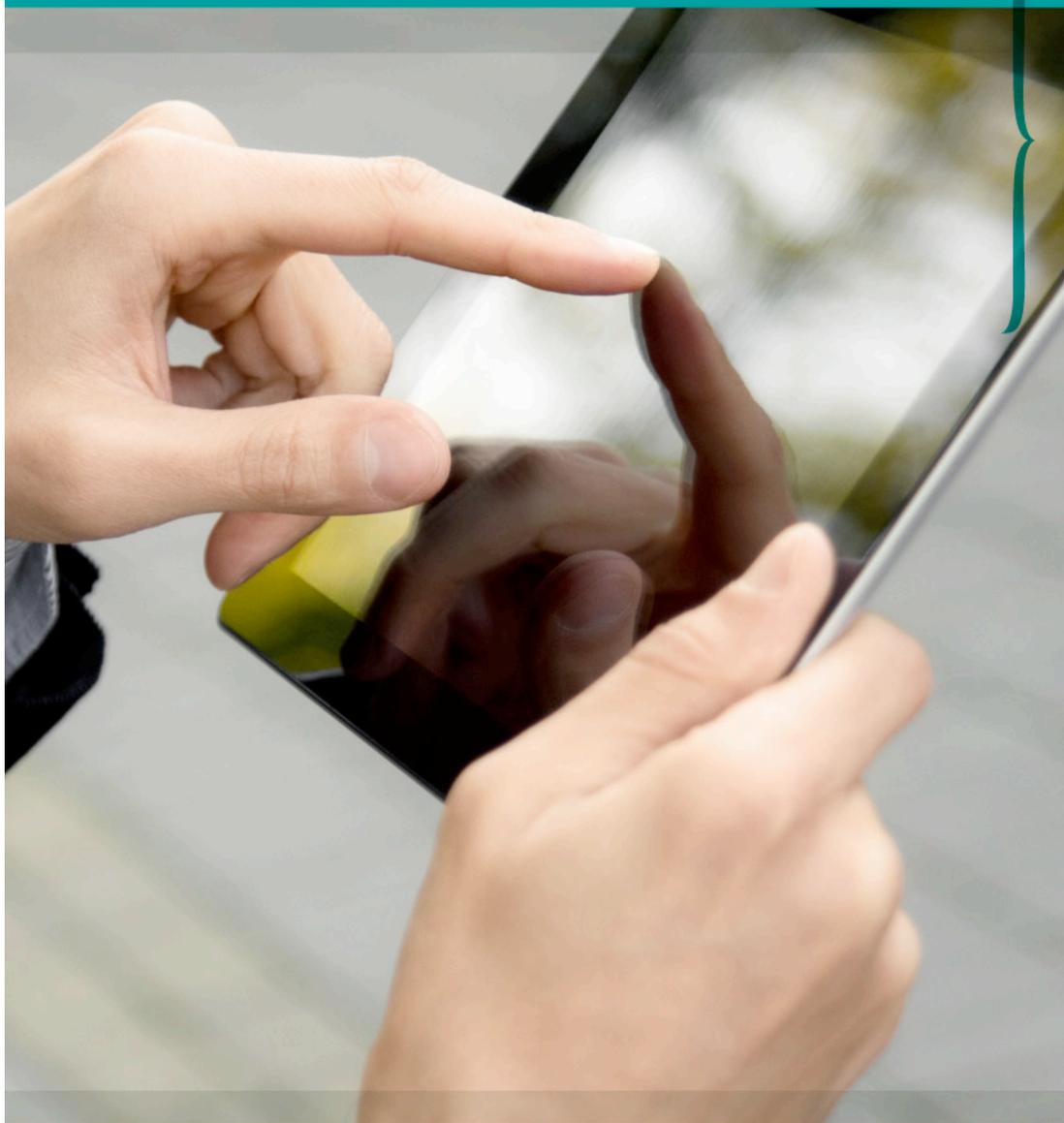
FEATURES INCLUDE:

- Regularly updated information and links

- Downloadable articles and tip sheets

- Self-search provider databases for summer camps, education resources, pet sitters, attorneys, financial advisors, volunteer opportunities, and more

- Legal and medical encyclopedias

- Financial and daily living calculators

- Savings Center providing 25 to 70 percent discounts on name-brand merchandise

- Spanish-language content

To help you make time for what matters most, your employee support program provides online access to a wide range of resources regarding the work and life topics of interest to you and your family—all available on one website. Just log on with your company's username and password, and navigate through articles, links, interactive content, self searches, self assessments, and more.

TOLL-FREE: **800-950-3434**
WEBSITE: http://reachworklife.powerflexweb.com
USERNAME: **username** • PASSWORD: **password**

REACH
E A P

Welcome to iFindCare

With the user name and password for your EAP/work-life Web site, you can use the app to start searching our extensive database of child care options and elder care resources. Then, you can simply:

- Select type of care (family care home, child care center, assisted living facility)
- Search using your current location or enter a zip code where you want to find care
- Review findings displayed as icons on a map
- Click on icons to get contact information on each facility
- Use our checklist to collect and save information on the facility

Our Care Consultants are available by telephone or through LiveChat to complete an assisted search or to gain more information on the facilities you have found.

To get started, download the free app through your iPhone by searching the apps store for "iFindCare." If you don't already have an iTunes account, you can download iTunes to your computer at **itunes.apple.com**.

NEED TO FIND CHILD OR ELDER CARE PROVIDERS AND RESOURCES ON THE GO?

iFindCare can be accessed using your iPhone to search for providers within a 20 mile radius of your current location or in any zip code. You can also review a sampling of related articles and handy checklists to use when choosing the best care for you and your family. The application is available immediately in the iTunes Store for the iPad, iPhone and iPod touch and can be downloaded for free directly from iTunes.

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ICONNECTYOU: YOUR EAP ON THE GO

FEATURES:

- Access your EAP at the click of a button

- Calls, instant messaging (IM), short message service (SMS), video, and articles

- Answered 24 hours a day, 365 days a year

- Members can connect with experts instantly or make arrangements for a later appointment

- Accessible by iOS and Android devices

- Browse our self-help resources with a few swipes on the phone

iConnectYou is an app that instantly connects you with professionals for instant support and help finding resources for you and your family.

To access iConnectYou, download the app from the App Store (iPhone) or Google Play (Android) and register using the iCY passcode below. For additional information, you may access your EAP's website following the details listed below.

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Your Employee Support Program

LEGAL/FINANCIAL CENTER

FEATURES AVAILABLE

- Free, one-year subscription to an online will—follow an interview-based format to create your customized, state-specific will. Review, revise or print it as often as you wish for up to one-year.

- Library of do-it-yourself legal forms, articles, and legal FAQs

- Online resource links to free tools to manage your personal finances, monitor your credit, and reduce unwanted mail and telephone solicitations

- 24/7 access through our employee support Web portal

Available with your employee support website, the Legal/Financial Center provides easy access to vital legal and financial information, downloadable and customizable legal forms, and online resources to free credit monitoring and personal finance management tools. Log on today to take advantage of your Legal/Financial Center.

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WORK-LIFE/EAP ASSISTANCE: **800-950-3434**
WEBSITE: **http://reachworklife.powerflexweb.com**

Helping you find time for
what's important.

STAFFED BY PROFESSIONALS

The service is staffed by a team of highly trained and qualified professionals who are experts in fields such as well-being, family matters, relationships, debt management, employment issues, consumer rights, and much more. You can be confident that the information you receive is accurate, up-to-date, and relevant to your particular circumstances.

TOLL-FREE: **800-950-3434**
WEBSITE: **www.reach-eap.com**

ALWAYS AVAILABLE.
ALWAYS CONFIDENTIAL.

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CHILD CARE
- Choosing Child Care
- Summer/Holiday Care
- Special Needs Child Care
- Community Resources

ADULT CARE
- Care for Older Adults
- Special Needs Adult Care
- Medicare and Medicaid
- Caregiver Support

PARENTING
- Adoption
- Pregnancy and Infertility
- Talking to Teenagers

EDUCATION
- K-12
- Colleges and Universities
- Financing
- GED/Vocational
- Tutors and Test Prep

DAILY LIVING
- Travel and Recreation
- Dining and Entertainment
- Consumer Issues
- Pet Care
- Community Resources
- Legal and Financial Issues
- Health and Wellness

CAREER
- Skill Building and Career Training
- Stress Management
- Co-Worker Relationships
- Transition and Relocation

Your employer recognizes the challenges of balancing work with the circumstances of everyday life. That's why you and your family have access to assistance provided by your employee support program. When you call the toll-free number, a qualified Consultant will respond to your request thoroughly and promptly. And when you log on to the Employee Support Website, you'll find an abundance of useful resources, articles, links and interactive tools.

SERVICE OVERVIEW
- A complementary component to other employee benefits
- Provides professional consultation and referral to assist with a wide spectrum of work, family, and personal issues
- Accessed by phone, e-mail, instant message, or website
- Available anytime, any day
- Always confidential
- No cost to you or your family to use the service.
- No limit to the number of issues for which you may use the service

SPECIAL FEATURES AND BENEFITS
In addition to the live support from professional Consultants, the following special features are available for your benefit:
- **LiveCONNECT**, a feature that allows you to instant message a Consultant
- **Savings Center**, where you can shop name-brands at discounts of up to 25%
- Financial and Daily Living Calculators, for a variety of practical applications
- **LifeLines**, a quarterly newsletter with information on topics for your daily life

The service is a free benefit from your employer.

ACCESS IS EASY
No matter when, no matter where, you and your family have access to professional support. Call or log on to get started.

TOLL-FREE:
800-950-3434

WEBSITE:
www.reach-eap.com

Resources for total well-being

WELLNESS RESOURCES
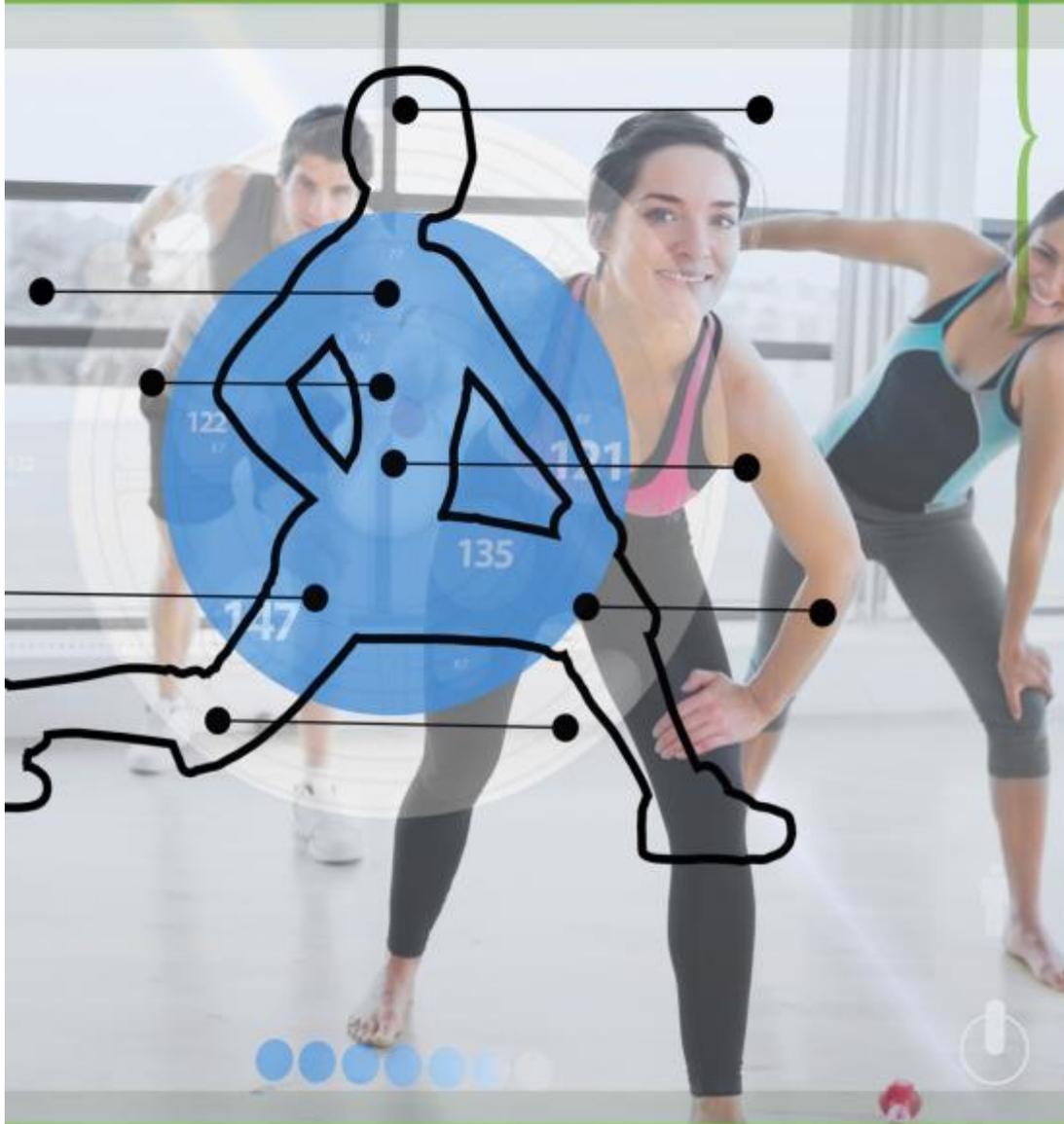
WELLNESS COACHING

By phone or Web, your Certified Wellness Coach, trained by Mayo Clinic, works with you to identify and maintain strategies that support goals such as weight loss, tobacco cessation, diet, exercise, and more.

ONLINE PORTAL

An online portal provides two-way messaging with your coach. It also offers online content generated by the results of your interactive health assessment: articles, videos, wellness plans, a meal plan, a calorie counter, recipes, and more.

Most of us have some wellness goals we are either working toward, or maybe putting off for later when we might feel more enthusiastic. Whether you are ready now or later, let your employee support program help your efforts with coaching and resources available by phone or Web. Also, be sure to ask your HR or benefits administrator about additional work-life and wellness support your organization offers.

TOLL-FREE: 800-950-3434
WEBSITE: http://reachworklife.powerflexweb.com

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Prepare, Print, and E-File Your Federal Tax Return for Free

SECURE AND REPUTABLE

TaxAct retains the following certifications and memberships:

- Authorized IRS e-File Provider
- Better Business Bureau Online Reliability Program
- BizRate.com Customer Certified
- Norton Secured
- TRUSTe Certified Privacy
- Trustwave Trusted Commerce

Free, confidential support is always available for tax issues, or any other issue that matters to you and your family. Call toll-free, or log on to the Web site with your username and password.

TAXACT HELPS MAKE TAX PREPARATION LESS TAXING.

For the 2015 tax preparation season, your work-life Web site offers you and your family TaxAct—an online tool for easy tax preparation and filing. TaxAct offers a variety of support and filing options including the option to prepare, print, and e-file your federal tax return (1040EZ) for free.

To take advantage of this beneficial resource, log on to your work-life Web site, and select the TaxAct Center from the list of Centers on the home page.

By filing with TaxAct, the accuracy of your returns is 100% guaranteed. If you are assessed a penalty due to a TaxAct calculation error, TaxAct will reimburse you the penalty and interest associated with that calculation error. Log on and get started!

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

Proc Folder: 339746

Doc Description: Employee Assistance Services

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
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

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 _Dann Thart_   **FEIN #**   81-4310213   **DATE**   Text

All offers subject to all terms and conditions contained in this solicitation