Board of County Commissioners
Agenda Request

Date of Meeting: April 7, 2020
Date Submitted: March 18, 2020
To: Honorable Chairman and Members of the Board
From: Wesley Hall, Interim County Administrator
Lonyell L. Butler, Human Resource Manager
Subject: Approval of the Services Contract with Dear Oaks EAP

Statement of Issue:
This agenda item seeks Board approval of the services contract with Dear Oaks EAP to provide employee assistance program services for the period of May 1, 2020 through April 30, 2023. This item also requests approval for the Chairperson to execute the contract.

Background:
EAP services has been provided to employees of the Board since 2001. Deer Oaks EAP Services has been providing EAP services throughout the country for over 27 years and within Florida since 2008. Their program consists of providing services to employees, to the immediate family of employees, and to members of an employee’s household, through a strategic management tool that effectively improves the health and productivity of the individual. Deer Oaks EAP Services also provides skill training, legal assistance, financial resources and tools, E-Newsletters, and webinars at no additional cost. Deer Oaks EAP Services’ focus is to effectively bring mental health services to those who need it, mitigate the impact of mental health conditions on the County’s overall healthcare expenditures, and support human resources initiatives related to employee engagement, respect in the workplace, and diversity.

Deer Oaks EAP has been the EAP service provider for the employees of the Board for the past four (4) years.

Analysis:
Staff advertised an RFP for EAP services to include a cost analysis. Proposals were received from only one provider, Deer Oaks EAP. This provider offers six (6) employee requested counseling sessions, as well as six (6) supervisor referral sessions. Deer Oaks EAP Services has a network of 38 providers within a 25 mile radius of Gadsden County. These network providers also accept the County’s group healthcare plan which allows for
a continuation of services beyond the six employee requested or managerial referral sessions. Services are offered in over 200 different commonly used languages for those employees who request services in a language other than English. In addition, Deer Oaks EAP Services offers legal and financial assistance, identity theft recovery and counseling, monthly electronic newsletters, online wellness tools, work/life services, and continued service access up to six (6) months post-employment.

Staff has identified this program as an invaluable resource to county employees and their households. This program is a major benefit which provides crisis intervention and general counseling on an as needed basis.

**Fiscal Impact:**

The cost of the annual program is $5,777.28. The funds have been allocated in the 2019/2020 fiscal budget.

**Options:**

1. Approve the service contract between the Board of County Commissioners and Deer Oaks EAP Services and authorize the Chairperson to execute the contract.
2. Do not approve.
3. Board direction.

**Interim County Administrator’s Recommendation:**

Option 1.

**Attachment(s):**

- Service Contract
- BID Tabulation Form
- Cost Sheet – Deer Oaks EAP Services
- Scope of Services Description – Deer Oaks EAP Services
Deer Oaks EAP Services
EMPLOYEE ASSISTANCE PROGRAM AGREEMENT

This EMPLOYEE ASSISTANCE PROGRAM AGREEMENT (the "Agreement") is effective on May 1, 2020 by and between Deer Oaks EAP Services with its principal office at 126 East Main Plaza, Suite 8, San Antonio, TX 78205 (hereinafter referred to as "The EAP") and GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS with its principal mailing address at P.O. Box 1799, Quincy, FL 32351 (hereinafter referred to as "The County").

WHEREAS, the parties wish to enter into an Agreement under which The EAP will administer a program and provide certain services to assist The County employees, to be called the Employee Assistance Program (EAP).

NOW, THEREFORE, in consideration of the mutual duties, covenants and obligations of the parties, the County and the EAP hereby agree as follows:

A  The EAP will provide and furnish assessment and referral services to employees of the County and members of their immediate families and households who either have been referred to the EAP by the County or have requested such services independently.

B  The purposes and goals of the EAP program are as follows:
   1  To guide, counsel and assist employees referred to the EAP by supervisory personnel, or employees / family members who seek assistance as a self-referral.
   2  To train The County managers and other personnel with supervisory responsibilities, how to identify employees with impaired job performance who have not responded to ordinary supervisory counseling or discipline.
   3  The EAP will make referrals to other agencies, where appropriate, in cases where problems presented are beyond the scope of the EAP staff’s usual capabilities and would be better addressed or treated by a separate treatment provider or agency.

The EAP covenants and agrees to perform the following services:

A  Direct Services:
   1. Initial EAP assessment which could include up to six (6) short-term counseling sessions, per incident, to employees, the employee’s family members and members of the employee’s household at no charge to the employee or the employee’s family. Ongoing
treatment costs after referral are to be the responsibility of the employee. EAP does not include psychiatric evaluations as part of the six sessions.

2. Non-emergency appointments will be scheduled within two to three business days of the initial telephone assessment.

3. Urgent appointments will be scheduled within six business hours and emergent situations will follow the escalation procedure as warranted. Critical Incident on-site services will be provided within 24-72 hours.

4. Monitor and track the attendance of treatment of those employees referred for job performance problems and regularly communicate with the EAP Coordinator at GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS regarding attendance and compliance with treatment recommendations. Supervisory Referrals may receive up to 6 sessions. (This information is provided only if an appropriate release of information has been signed by the employee.)

B Consultation and Training:

1. Assist with the review and continued development of the employer statement of philosophy, personnel policy, and procedures regarding EAP use and benefits. Review confidentiality procedures and pertinent employment issues.

2. Provide effective promotional materials to enhance employee awareness of EAP.

3. Train senior management and supervisors in identification and effective referral strategies for employees with work performance problems.

4. When requested, consult with EAP Coordinator regarding workplace and employee issues.

5. Upon request, provide wellness seminars designed to promote EAP awareness and improve employee health and lifestyle choices.
C Resource Development:

The contractor will maintain an assessment and referral service which consists of a network of local treatment specialists, other professionals, and service agencies.

D Communication Access:

The EAP will make available telephone numbers to clients and managers that offers services 24/7 for standard, urgent, and critical incident services.

**GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS** covenants and agrees as follows:

A It will designate an administrator/manager who will be the EAP Coordinator of the County and liaison with The EAP consultant.

B The County will promote awareness of the EAP through internal communications and by top-level management endorsement.

C The County will compensate the EAP for the services described above as follows:

The total annual sum of $5,777.28 is payable for the provision of off-site, external EAP counseling services, consultation, training and promotional materials. This sum is based on an employee count of 204.

D The term of this Agreement shall be for 36 months, from May 1, 2020 through April 30, 2023. Either party may terminate this Agreement upon 45 days written notice to the other. In the event of termination, the basic charge will be prorated.

E **GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS** reserves the option to extend this contract upon satisfactory completion of the effective period of this agreement. If **GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS** exercises the option to renew this contract, or any portion thereof, the renewal will be on a yearly basis for a period of up to two (2) years. Any extension may be accomplished by a letter from **GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS** to THE EAP prior to the April 30th deadline.
GENERAL PROVISIONS:

F  The records of clients and other persons serviced by the EAP will be treated as confidential, in compliance with state laws governing the confidentiality of patients' medical records, and federal laws where applicable, subject, however, to valid compulsory legal process and the rulings of court having jurisdiction of the matter in the event records are subpoenaed.

G  The County recognizes that the EAP has no obligation to provide services to employees beyond the emergency services as set forth above, assessment, brief counseling, and referral to other agencies or providers where appropriate. The employee will be responsible for the costs of any and all services of any other agency or provider to which the client has been referred for assistance.

H  The obligations of the EAP under this Agreement shall not be assigned without the prior written consent of the County.

I  The EAP agrees to provide its services in a facility which is licensed by proper state authorities and it will be provided by mental health care professionals with appropriate licenses, certificates or other credentials.

J  The parties agree that The EAP is an independent contractor in performing its obligations hereunder. In no event will the County be liable for any injury or damages to employees or members of their families or others arising out of any acts or omissions of the EAP in performing its services under this Agreement. The EAP will not be liable for any injury or damages to employees or members of their families arising out of any acts of omissions by the County under this Agreement. The EAP agrees to indemnify and hold the County harmless against claims arising out of its own acts and omissions and the acts and omissions of its employees under this Agreement.

K  The EAP shall maintain general liability and professional liability insurance with limits in the minimum amount of $1,000,000. The EAP shall also maintain workers' compensation and employer liability insurance, as well as all other insurance required by and in accordance with law.
IN WITNESS WHEREOF, the parties have executed this Agreement effective as of, though not necessarily executed on, the Effective date.

Signed, sealed, and delivered in the presence of:

(1st Witness Signature)

(1st Witness – Printed Name)

(2nd Witness Signature)

(2nd Witness – Printed Name)

DEER OAKS EAP SERVICES, LLC, a foreign limited liability County authorized to transact business in Florida

By: Alicia Barrera

Its: Executive Director

STATE OF Texas
COUNTY OF Texas

The foregoing instrument was acknowledged before me this 24 day of March, 2020, by Alicia Barrera, as Executive Director of Deer Oaks EAP Services, LLC, a foreign limited liability County authorized to transact business in Florida, on behalf of said County. Such person: ( ) is personally known to me; ( ) produced a current driver's license as identification; or ( ) produced ______________ as identification.

OLIVIA MARIE OSBURN
(Notary Public)
Comm. Expires 07-14-2022
Notary ID 12988405-3

Olivia Marie Osburn
(Signature of Notary Public)

ATTEST: GADSDEN COUNTY CLERK OF COURT

GADSDEN COUNTY, FLORIDA, a political subdivision of the State of Florida

NICOLAS THOMAS

APPROVED AS TO FORM FOR RELIANCE BY GADSDEN COUNTY
ONLY: GADSDEN COUNTY ATTORNEY

CLAYTON KNOWLES

ANTHONY O. VIEGBESIE, PhD.
Chairperson, Gadsden County Board of County Commissioners
# BID TABULATION FORM

**BID TITLE:** EAP Services  
**BID NUMBER:** 19-18  
**OPENING DATE:** 10-18-2019  
**TIME OF OPENING:** 10:00 AM  

**OPENED BY:** Shelia Faircloth  
**TABULATED BY:** Jeronda Robinson  
**VERIFIED BY:** Jennifer McQuagge  

<table>
<thead>
<tr>
<th>BIDDER LIST</th>
<th>BID AMOUNT</th>
<th>MET SPECs</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deer Oaks EAP Service</td>
<td>$5,777.28</td>
<td></td>
<td></td>
</tr>
<tr>
<td>126 E. Main Plaza Ste. 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Antonio, TX 78205</td>
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</tbody>
</table>

**Adjourned @ 10:02 AM**

Disclaimer: Bid tabulations are the results of vendors who responded to the bids and/or quotes listed. Totals listed on the bid tabulation are for comparison only. Bids will be evaluated for completeness and compliance with specifications by the Purchasing Department and the using department. The tabulations do not represent a notice of award but only of the bids received.
Gadsden County EAP Cost Proposal

Gadsden County
Board of County Commissioners

Employee Assistance Program (EAP) Cost Sheet

Analysis: After hours and 24-hour emergency assistance is required.

<table>
<thead>
<tr>
<th>DIRECT SERVICES PROVIDED:</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>Number of Sessions</td>
<td>6</td>
</tr>
<tr>
<td>8 - Employee Request</td>
<td></td>
</tr>
<tr>
<td>6 - Supervisor Referred</td>
<td></td>
</tr>
</tbody>
</table>

**Total Cost: $2,36 PEPM**

CONSULTATION, TRAINING, AND GROUP ASSISTANCE

<table>
<thead>
<tr>
<th>Supervisory/Wellness</th>
<th>6 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deer Oaks has included 2 hours of onsite training per year as well as 15 webinar hours</td>
<td>Total Cost: $0</td>
</tr>
</tbody>
</table>

Deer Oaks has included 2 hours of onsite training per year as well as 15 webinar hours. The cost for additional onsite and webinar training hours is detailed on the following page.

MATERIALS QUANTITY

| Supervisory Packets | 25 |
| Brochures | 200 |
| Wallet Cards | 200 |
| Color Posters | 15 |

**Total Cost: $0**

ANNUAL TOTAL: Direct Service, Consultation, Training, & Materials

| Cost per Employee per Year | $28.32 |
| Cost per Employee per Quarter | $7.08 |
| Cost per Employee per Month | $2.36 |

**Annual Total Cost: $5,777.28**

OPTIONAL SERVICES

Critical Incident Debriefings | $300 per hour (two hour minimum per event)
Return to Work Conferences | $300 per hour
Conflict Resolutions | $300 per hour

*Cost for full-service mediation; conflict resolution through the mandatory referral process is included in the above PEPM cost.*
Tab 4: Cost Proposal

Deer Oaks offers Gadsden County an exceptional benefit package including Employee Assistance Program, Work/Life, and Workplace Management Services. This integrated program provides a holistic approach to addressing personal issues that affect employee well-being and workplace performance. Deer Oaks’ expertise in serving local government combined with our flexible, hands-on approach to account management and customer service will ensure that the County’s program is tailored to meet its specific needs, now and in the future. The County will continue to benefit from Deer Oaks’ deep industry expertise, rapid response, and personal attention. Additionally, through orientations, supervisor excellence webinars, and attendance at health and wellness events, we seek to continue to enhance employee awareness of the EAP over the contract term to ensure consistently healthy program utilization. The PEPM and annual rates include, but are not limited to, the following programmatic highlights:

### Integrated Employee Assistance & Enhanced Work-life Program

Rates are per employee per month (PEPM) for approximately 204 employees:

- **6 Visit Model EAP:** $2.36 PEPM  
  - 24-hour live answer of the helpline by Master’s level Clinicians  
  - All calls answered live- no voice messaging system, phone tree, or general customer service  
  - Program access via Helpline or iConnectYou Smartphone App- engage with a counselor via phone, video, instant messaging or SMS text.  
  - RMS Instant Messaging with a Work-life Consultant  
  - Telephonic translation service (200 languages)  
  - Nationwide network of 58,000+ affiliate counselors, including multilingual/multicultural clinicians  
  - Telephonic clinical assessments during the initial call (do not count toward the visit model)  
  - Referrals to EAP providers and to other resources for in-person services  
  - Short-term telephonic, in-person, and video counseling available  
  - Unlimited formal management referral coordination and follow-up  
  - Unlimited two-party conflict resolution through the management referral process

- **Coverage Post-Employment..................**Extended 6 months

- **AWARE Mindfulness-Based Stress Reduction Program..........................**Included

- **Virtual Group Counseling..........................**Included

- **Telephonic Life Coaching (6 sessions)..........................**Included

- **Enhanced Work-life Program..........................**Included
  - Legal Assist  
  - Financial Assist  
  - Daily Living Assist  
  - ID Theft Prevention & Recovery Assistance  
  - Free Online Simple Will Preparation  
  - Take the High Road Program  
  - Free Credit Monitoring - Confirmed Match Work-life Referral Packets

- **Training Catalog/Ontsite Orientation..........................**2 hours

- **On-site Health Fair/Event Attendance..........................**Included in onsite hours

- **Travel Expenses..........................**Included

- **Webinar Catalog Training..........................**15 hours

- **Webinar Orientation..........................**Unlimited

- **Critical Incident Response Services (2 hour event)..........................**Fee for service

- **Telephonic Management Consultation..........................**Unlimited

- **Program Promotion (hard copy and electronic)..........................**Unlimited
<table>
<thead>
<tr>
<th>Tab 4: Cost Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee &amp; Supervisor E-Newsletters.................................................................Monthly</td>
</tr>
<tr>
<td>Branded Engagement Engine Work-life Website.....................................................Unlimited Access</td>
</tr>
<tr>
<td>Account Management..................................................................................................Included</td>
</tr>
<tr>
<td>- Designated Project Manager - Hands-on implementation</td>
</tr>
<tr>
<td>- Quarterly utilization reports - Quarterly utilization review meetings</td>
</tr>
<tr>
<td>- Program evaluation - Performance tracking</td>
</tr>
<tr>
<td>Rate Guarantee..........................................................................................................3 years</td>
</tr>
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</table>

**Optional Services**

- Additional Training- Training Catalog (beyond the 2 hrs) ........................................$300.00/hour
- Additional Training- Webinar Catalog (beyond the 15 hrs) ........................................$150.00/hour
- Additional Health Fair/Event Attendance ...................................................................$150.00/hour
- Critical Incident Stress Debriefing ............................................................................$600.00/2 hour event. $300.00/subsequent authorized hour
- DOT Substance Abuse Professional (SAP) Evaluations.............................................$600.00/case
- Full-Service Mediation ...............................................................................................$300.00/hour
- LiveWell Telephonic Wellness Coaching + Online Wellness Portal...........................$0.46 PEPM
- Executive Coaching ....................................................................................................$500.00/hour
  One-on-one telephonic executive coaching designed to reinforce key leadership skills.
  Includes 60-minute telephonic sessions, post-session reports, and a coaching plan with goals
  set forth by the individual’s supervisor and/or HR.

**Program Exclusions & Limitations**

- Counseling services beyond the allotted sessions covered in the plan
- Counseling for long-term issues that fall outside of the EAP’s short-term intervention model
- Court ordered treatment or therapy, or any treatment or therapy ordered as a condition of parole, 
  probation, custody, or visitation evaluations, or paid for by Workers’ Compensation
- Fitness for duty evaluations/determinations which are used to evaluate whether an employee is safely
  able to perform his or her duties, such as psychological testing and a written report, although a
  referral may be provided
- Formal psychological evaluations which normally involve psychological testing and result in a written
  report, although a referral may be provided
- Inpatient treatment of any kind, or outpatient treatment for any medically treated illness
- Investment advice (nor does plan loan money or pay bills)
- Legal representation in court, preparation of legal documents, or advice in the areas of taxes, patents,
  or immigration
- Prescription drugs and psychiatrist services, although a referral may be provided
- Services by counselors who are not participating providers
- Authorization for leaves of absence or time off
Tab 2: Response to Scope/Objectives

utilize internal provider databases and our research teams to locate appropriate referrals for each member.

Finally, our EAP and Work-life Programming is anything but one-size-fits-all. Our programs are designed to be flexible and are able to be customized to the individual needs of our clients- even if those needs change throughout the contract term.

**DEER OAKS EAP SERVICES: SCOPE OF SERVICES OVERVIEW FOR GADSDEN COUNTY**

<table>
<thead>
<tr>
<th>Employee/Dependent Access</th>
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<tbody>
<tr>
<td><strong>Eligibility</strong></td>
<td>All employees, dependents, domestic partners, and household members are eligible to access the EAP starting on day one of the contract</td>
</tr>
<tr>
<td></td>
<td>Eligibility is based on the attestation of the member</td>
</tr>
<tr>
<td></td>
<td>Employees and retirees who terminate their employment for any reason will have continued access to the EAP for six (6) months post-employment.</td>
</tr>
<tr>
<td><strong>Helpline answered “live” 24/7 by Master's Level Counselors</strong></td>
<td>members will never reach an automated voice messaging system, phone tree or general customer service representative. They will speak directly with a live EAP clinician each and every time they call for assistance, no matter the day or time. A toll-Free TTY Service for the Hearing Impaired and language line are available.</td>
</tr>
<tr>
<td><strong>iConnectYou Smartphone Application</strong> through which members may engage with a counselor via phone, video, instant messaging or SMS text. The App is free to download for EAP members.</td>
<td></td>
</tr>
<tr>
<td><strong>Real Messaging Service (RMS) Instant Messaging</strong> through which members may chat live with a Work-life Consultant regarding child care, elder care and other daily living work-life issues. The tool features simultaneous translation in over 100 languages.</td>
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<table>
<thead>
<tr>
<th>Intake/Short-term Counseling</th>
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<tbody>
<tr>
<td><strong>Telephone Triage</strong></td>
<td>Telephone triage conducted by Master’s Level Counselors 24/7 to assess initial care management needs and appropriate referrals i.e. clinical assessment, short-term counseling, legal or financial consultation, work-life consultation, community resource referral or referral to other resources</td>
</tr>
<tr>
<td></td>
<td>EAP Counselors provide in-the-moment telephonic support and crisis intervention for members who are experiencing suicidal ideation, homicidal ideation, violent behavior, substance abuse related emergencies, need for in-patient psychiatric hospitalization, child/elder abuse, and/or domestic violence.</td>
</tr>
<tr>
<td><strong>In-the-Moment Telephonic Support</strong></td>
<td>All clinical calls receive an in-depth telephonic assessment by an EAP Counselor.</td>
</tr>
<tr>
<td></td>
<td>The telephonic clinical assessment focuses on psychosocial factors to determine the need and urgency for an appointment.</td>
</tr>
<tr>
<td></td>
<td>The assessment identifies and clarifies presenting problems as described by the employee, relevant background history, initial goals, and current risk factors.</td>
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</table>
Tab 2: Response to Scope/Objectives

Appointment Scheduling

- Following the assessment, if it is determined that an in-person appointment is needed with a local EAP provider, the case manager in coordination with our network management team identifies and contacts counselors based on the member’s location, presenting problem, needs, availability, and other preferences. The member is then provided with the selected provider’s information for appointment scheduling.

- The following indicates the timelines for confirmed referrals and appointment availability by standard, urgent and emergent cases.

**Intake & Telephonic Clinical Assessment** — Available immediately during the member’s initial call into the EAP 24/7

**Standard** — A counselor is appointed within 2-3 business days from the time of the telephone assessment. The case manager contacts the employee with the appointed counselor’s name and contact information. The counselor must have appointment availability within five (5) business days of accepting the case.

**Urgent** — The definition of an urgent case is one in which the caller is moderately distressed with some impairment in ability to function or presents with some suicidal or homicidal ideation, but there is no clear plan or intent to harm self or others. Case manager develops safety plan with the member, confirmed match referral provided within 6 business hours. The provider must have appointment availability within two (2) business days of the initial contact with the EAP. In-the-moment telephonic counseling is provided to those in need of such support.

**Emergent** — In these situations the case manager follows the escalation procedure as warranted. This may include involvement of emergency services, ER or hospitalization to preserve the employee’s safety. If emergency services become involved, we ensure that the appropriate services are being offered by confirming with the emergency responders who arrive on the scene, whenever possible. If not possible, we provide a welfare check to ensure that the crisis has been resolved. If the safety of the caller is confirmed and emergency services are not needed, the counselor provides in-the-moment support. Face-to-face counseling is then provided on the timeframe for urgent requests.

- Employees along with their dependents and household members will be eligible to receive six (6) sessions per separate issue for assessment and short-term counseling per 12 month period.

- The primary counseling model used by Deer Oaks is called solution-focused brief therapy. This involves a move away from the analysis of problems to the discovery of solutions that are already at work in an individual’s life.

- Through this method, the Deer Oaks EAP supports employees and their family/household members on a wide range of mental health topics for which short-term counseling is appropriate. Individuals may access the service for support with a variety of personal and work-related issues such as depression,
Tab 2: Response to Scope/Objectives

**Telephonic Life Coaching**

- Stress, anxiety, grief or loss of a loved one, substance abuse, workplace difficulties, depression, and other behavioral health issues.
- The EAP does not cover issues that require physician/psychiatric evaluation, psychological testing, chronic mental health illness, long-term psychotherapy treatment, or inpatient or residential treatment services. In these cases, we will provide the individual with an appropriate referral to either his/her health plan or to other community resources.
- Certified telephonic coaches partner with participants in a thought-provoking, creative process for navigating life transitions and maximizing personal and professional potential.
- Areas covered include career development, performance improvement, mentoring, work-life balance skills, managing change/transitions, managing stress, and time management skills.
- Life coaching is offered in a six (6) session model that generally lasts three to four months.
- In-person, video, and structured telephonic counseling are available based on the member’s preference and clinical suitability.

**Tele-Health**

- A 2008 study by the American Psychological Association found that there is no difference in the quality of mental health care that patients receive in a traditional face-to-face setting versus remotely via telehealth, making telehealth a viable and effective option for your employees.
- The offering of telephonic and video-based counseling in addition to the traditional in-person model enhances the outreach, ease, and accessibility of counseling for all employees including those who may live in remote areas, work from home, or need additional flexibility in their daily lives.
- Alternate modality of support for participants experiencing life stress, pain, and challenges with focus and concentration, as well as individuals who want to increase their awareness of and commitment to intentional living.
- With a personalized approach to applying mindful practices to life, Aware teaches participants how to be engaged, diminish distractions, and counteract stress. The program cultivates focused and resilient employees, who are more engaged and productive in the workplace.
- Through six (6) weekly sessions, MBSR-trained health and wellness professionals provide one-on-one support and supply electronic resources for self-guided individual practice.
- Assessments conducted at the start of the program and upon completion provide measurable outcomes to demonstrate personal progress.
- Participants may be referred to a group based on a clinical assessment; those referred will present with similar issues (e.g., bereavement, work-life balance, anxiety) and without risk.
- Group sessions are currently conducted via phone, with video conferencing capability currently in development.
- Group sessions are 90 minutes in duration and take place once per week throughout the eight-week program.

**Aware – Mindfulness-Based Stress Reduction (MBSR)**

**Virtual Group Counseling**
Tab 2: Response to Scope/Objectives

95% Case Resolution within the EAP

- A clinician leads each group to ensure a sound contract is agreed upon during the first session, to maintain time boundaries, to provide structure and containment, and to keep the discussion solution-focused.
- It is our goal to assist as many members as possible within the EAP without the need for additional intervention through costly medical plans.
- Currently, approximately 95% of cases across our book of business are resolved within the EAP without the need for outside referral.
- Of the remaining 5%, 3% are referred to longer-term care/the participant's behavioral health provider and 2% are referred for work-life-related consultation (e.g., daily living, legal, financial, child/elder care).
- Short-term counseling through the EAP may not be adequate to meet every individual's needs. If the initial assessment establishes that long-term specialist counseling is required, or if this is identified at an early stage of the counseling process, then we can make an external referral to the employee's health plan or to community resources to ensure that the employee is placed on the path he or she needs to get more intensive support.
- Deer Oaks maintains a referral network of community resources to facilitate referrals outside of the EAP and coordinates with other County-sponsored health and wellness vendors when needed.

Referrals Outside of the EAP

- Deer Oaks EAP offers a more comprehensive approach to supporting the overall wellness of your employees. Our belief is that true employee wellness combines physical health, mental/emotional health, and practical life management.

Work-life Services

- Work-life Philosophy

Enhanced Work-life Balance Services - work-life, daily living, child care and elder care services

- Our EAP services complement County employee wellness initiatives by providing not only counseling services to improve the mental and emotional health of employees, but a wide scope of work-life/life management services to help individuals deal with the daily issues and stress that can increase risk of illness and reduce overall productivity.
- Work-life consultants consult with members regarding their work-life needs (e.g., child care, elder care, adoption, parenting education, pet care, relocation services, vacation planning, event planning, home repair, etc.
- All provided referrals are qualified and matched to the specific needs and requirements of the user—100% of the time. For example, is the agency within a reasonable distance of the member's work or home? Does the agency have availability meeting the member's requirements? Does the agency's fees meet the member's budget? Does the agency accept the specified form of payment?
- Referral packets are provided to members within three (3) business days for standard cases and within six (6) business hours for urgent cases.
- Each agency is contacted to ensure availability and to determine if it is an appropriate match for the employee's needs. The consultant then selects three (3) to five (5) providers with confirmed vacancies and provides them to the caller in the agreed upon method.
Tab 2: Response to Scope/Objectives

Advantage Legal Assist

- Online Work-life Resource Locators
- Free 30-minute telephonic advice consultation or in-person consultation with an attorney
- 25% discount on hourly attorney fees if representation is required
- There is no limit to the number of times you can use the service for different issues
- Coverage available in all 50 states
- Telephonic attorneys cannot self-refer, so you are assured unbiased advice
- Covered issues include: family law, criminal, bankruptcy, adoption, elder care/wills/trusts/estate planning, probate, landlord/tenant issues, debtor/creditor, consumer issues
- Excluded Issues: Employment as it relates to employees and family members, one’s own business, class action lawsuits, taxes
- Free unlimited telephonic consultation with an Accredited Financial Counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction and financial planning
- There is no limit to the length of the consultation or restrictions on repeated use of the service
- Counselors address issues via a toll-free information line, and follow up by mailing supporting educational materials;
- After the appointment, the counselor will email and/or mail a summary of goals and steps along with any additional, applicable, educational materials and a quality survey
- All counselors are knowledgeable in a wide range of financial topics
- Supporting educational materials available
- Excluded issues include tax issues, counseling, advice or comparison of specific financial services or products

Advantage Financial Assist

- Unlimited online access to a wealth of educational legal and financial resources, links and tools
- Interactive Online Simple Will- create a legally-binding simple state-specific will at no cost through a step-by-step online “interview process”
- Access to state agencies to obtain birth certificates and other records
- Links to tax guides, the current year’s tax forms and financial calculators
- Self-improvement “Task Builders” for interactive financial improvement

Advantage Legal & Financial Online Resources

Identity Theft Prevention & Recovery Services

- Provides victims consultation with an Accredited Financial Counselor who will discuss the situation with the member and provide consultation and information on steps that should be taken upon discovery of identity theft
- Consultation may include: how identities can be stolen and common warning signs; how to obtain one’s credit report(s) to look for indications of identity theft; how to read and understand one’s credit report; and steps to take if identity theft is indicated
- Free credit monitoring service available at deeroakseap.com
- Resource links, tip sheets, and brochures on avoiding and identifying identity theft are available along with referrals to full-service credit recovery agencies
Tab 2: Response to Scope/Objectives

Training Services

Training Methodology

- Orientation and educational seminars are one of the most important ways of reaching out to employees, supervisors, and senior-level management.
- The Deer Oaks Employee Assistance Program (EAP) offers a variety of specialized training, orientation sessions, and wellness seminars covering a range of work-life, wellness, and EAP topics.
- By providing a wide variety of seminars, Deer Oaks can assist the County in promoting a healthy and motivated work environment where employees are engaged and effective in their roles. These learning opportunities are designed to educate and motivate employees and managers to be proactive and effective in managing their work responsibilities and personal lives.

Training Catalog topics:

Bank of 2 onsite orientation/Training Catalog seminar hours annually

Webinar Catalog topics:

Bank of 15 Webinar Catalog training hours annually

On-Demand Webinars

Online Skill Builder e-Learning Courses

2019 Supervisor Excellence Webinar Series- Employee Engagement

Our 60+ Webinar Catalog seminars are fully customizable and may be tailored to specific challenges and various audiences
- Includes consultation with our Director of Training, Greg Brannan, to design issue-focused training and awareness programs for various employee populations
- Some of our popular webinar series include stress management, employee engagement, diversity in the workforce, and the effective management of inter-generational relationships
- Online attendance tracking makes webinars an effective tool for staff development training
- Increases training outreach to all locations and maximizes attendance
- 70+ on-demand webinars through deerookseap.com may be accessed at any time for individual or group training at home or work.
- A new webinar is added monthly (12 per year).
- Certificates of completion are available for download following each seminar
- 17 e-learning courses combine valuable training with the ease and flexibility of learning online.
- E-learning courses provide training for success both on and off the job by giving your employees practical tips on managing the workplace and their world.
- Courses are fully narrated with an optional closed-captioned feature for your privacy.
- Certificates of completion are available for download following each session, making them an effective tool for workplace training.
- A series of practical educational programs designed to help supervisors, managers, and other interested employees to build more engaged and productive work teams.
- This webinar series is available to all supervisors, managers, and other interested employees and does not count toward your organization’s training hour bank.
Tab 2: Response to Scope/Objectives

2019 Supervisor Excellence Webinar Series & Leadership Certificate Program
Deduct 4 hours from the training bank

2019 Stress Management Webinar Series
Deduct 4 hours from the training bank

Pre-Recorded Orientation Webinars

Management Assistance Program

Supervisor Mandated Referrals

Critical Incident Stress Management Services
Fee for Service
2 hour event per incident

- Spots for the live presentation are available on a first-come, first-serve basis
- A recording is distributed following each live session
- A quarterly webinar series designed to provide supervisors, managers, and other interested employees with enhanced skills to improve workplace morale, employee motivation, and staff productivity.
- Supervisors/managers that attend all four sessions either live or via online recording will receive the Deer Oaks 2019 Leadership Certificate.
- Deduct 4 hours from training bank for organizational participation
- A quarterly webinar series centered on stress management.
- This training series is designed to provide your employees with the knowledge and skills necessary to cope more effectively with stress so they can live healthier and more productive lives.
- There will be two available sessions per topic and the series is open to all employees.
- Deduct 4 hours from training bank for organizational participation
- Utilize our archive of on-demand seminars, online e-learning courses, pre-recorded EAP orientation, live and pre-recorded orientation webinars, and Webinar Catalog training to facilitate simultaneous training at various locations or individual training at times convenient for your employees.

- No limit to the number of mandatory referrals accepted each year
- Assistance to managers in making Management-Directed/ Mandatory Referrals including telephonic consultation with our Manager Consult Team to process the behavior/issues and determine the appropriate action i.e. coaching sessions, supervisor-suggested referrals, mandatory referrals, mediation, etc.
- Rapid response to all mandatory referral requests
- Follow-up assessment/compliance reports provided to the employer’s point of contact within the limits of the professional confidentiality regulations with the employee’s consent
- In the event of a major incident, Deer Oaks provides rapid and efficient telephonic and/or on-site support based on needs, preferences and clinical suitability.
- Our trauma response professionals are local residents who reside in your communities and are available quickly to be on-site in the case of a critical event.
- Trauma Response Professionals are available within 24-72 hours of the critical incident to provide group critical incident stress debriefings, with recommendations for follow-up treatment.
- The 24-72 hour response time is best practice as it allows those involved the opportunity to move past the initial shock and time to process the event, which enables the individual to be more receptive to assistance.
- These interventions are customized to meet the needs of various employee groups.
Tab 2: Response to Scope/Objectives

**CISD- Supervisor/Manager Support**
- Deer Oaks provides telephonic consultation with managers/supervisors regarding the incident, traumatic stress reactions, self-care, their role in planning and recovery and how they can best assist employees following the critical incident.
- Coaching on how to talk to employees about the incident is also very important.
- Assist HR and administration with the development of messaging to affected staff and broader audiences.

**Attendance at Health Fairs – Fee for Service**
- Attendance at health fair(s), wellness program events, open enrollment sessions and other training events is an integral part of our program awareness campaign.
- These types of events create awareness and interest while allowing employees to interact, ask questions and learn about the program at a deeper level.

**Telephonic Management/ Organizational Consultation**
- Unlimited direct one-on-one telephonic supervisor, management, and human resources consultation is available to provide guidance regarding issues, policies, practices and events that affect behavior in the workplace.
- Our counselors have received special training to enable them to counsel managers on the unique challenges they face in their roles.
- ManagerAssist is a key component of our counseling service that differentiates it from other non-workplace-based counseling services. Support to management is as important as personal counseling in achieving the goal of increasing employee productivity. Managers’ need for such support is high. This service allows the manager to balance the imperative for improved performance with the offer of assistance with any personal problems. This service also allows the manager to step out of the role of counselor or diagnostician and focus on performance.

**Case Management**
- For cases that identify with risk (suicidal, homicidal, domestic violence, and/or child/elder protection concerns), the case manager will follow-up with the participant one day after the provider referral has been sent.

- For cases that involve minors, couples, family, and transitional support, the referred provider is required to complete a session review with our clinical team after the first session to ensure appropriateness and plan for ongoing treatment.

**Program Promotion**
- Unlimited access to our innovative Work-life website featuring an extremely comprehensive level of resource articles, assessments, audio, and video files covering emotional well-being, health and wellness, and workplace issues as well as child care, elder care, adoption, and education.
- The site is kept current and up-to-date by a team of dedicated staff, with new information added monthly.
- Organization-specific username and password to access the site.
- Demo link: https://www.advantageengagement.com/1601/login_company.php
  Login: deeroaks  Password: deeroaks

**Online Tools and Resources at www.deeroakseap.com**
- Promotional materials including electronic and hard copy brochures, wallet cards, posters, and topical flyers advertising the EAP benefit, its confidentiality, and means of accessing services will be provided during implementation.
- Promotional materials are available on an on-going basis.
Tab 2: Response to Scope/Objectives

- Other materials include pre-recorded orientation webinar, Supervisor EAP Handbook (electronic), Training Catalog (electronic), Supervisor Guidelines Handbook (electronic), and a CD with camera-ready materials.
- We welcome the County’s input into these promotional activities, as with all features of the program, and can customize a plan to meet each member organization’s requests.
- Materials are available in English and Spanish upon request
- Monthly Employee and Supervisor Electronic Newsletters are distributed to our client points of contact and uploaded onto our website.

Monthly Employee and Supervisor Newsletters

Other Services/Program Components

Tele-Language Services
- Telephonic interpretation in 200 of the most commonly spoken languages and dialects
- For in-person counseling referrals, individuals are matched with an affiliate who is an appropriate match to their clinical needs, as well as primary language.
- Deer Oaks reimburses EAP participants for their cab, Lyft and Uber fares in the event that they are incapacitated due to impairment by a substance or extreme emotional condition. This process is simple, and like all other EAP services, confidential. This service is available once per year per participant with a maximum reimbursement of $45.00 (excludes tip).
- DOT SAP evaluations are specialized evaluations conducted for employees that fall under DOT regulations and who violate DOT drug and alcohol regulations.
- Deer Oaks follows the standards for SAP services as stipulated by the State of Transportation- 49 CFR Part 40, coordinates a referral to a SAP who assesses the employee and makes recommendations concerning education, treatment, follow-up testing, and aftercare.

Take the High Road Program

OT Substance Abuse Professional (SAP) Evaluations
fee-for-service

Program Evaluation Reporting

- Quarterly utilization reports include statistical usage information without infringing on member confidentiality.
- 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; and workplace activities (on-site events including training, crisis support, etc.)
- Designated County personnel are able to track utilization and run canned reports on demand through our Focus Administrative Dashboard.
## Tab 2: Response to Scope/Objectives

### Program Evaluation
- Interactive Voice Response (IVR)-based satisfaction survey offered to members live at the end of their initial phone call with a counselor or work-life consultant and at case closure
- Online member satisfaction survey available via deeroakseap.com
- Training survey
- CISD survey
- Monitoring of utilization, trends, and the effects of promotional campaigns
- Quarterly utilization reports and formal review of the data with County personnel
- Internal audits of call center personnel each month consisting of silent call monitoring, clinical case work review, work-life case work review, secret shopper programs
- Grievance procedure in place. We are committed to taking immediate action and corrective steps if deficiencies are identified by our clients.
- Coverage Period for this Contract will be 3 years maximum.

### Internal Quality Control Plan

### Contract Term