

## Board of County Commissioners Agenda Request

**Date of Meeting:** August 2, 2016

**Date Submitted:** July 7, 2016

**To:** Honorable Chairperson and Members of the Board

**From:** Robert M. Presnell, County Administrator  
Arthur Lawson, Sr., Assistant County Administrator  
Lonyell L. Black, HR Analyst

**Subject:** Approval of the Services Contract with Dear Oaks EAP

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### **Statement of Issue:**

This agenda item seeks Board approval to approve the services contract with Deer Oaks EAP to provide employee assistance program services for the period of October 1, 2016 through September 30, 2017. 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 24 years and within Florida since 2008. Their program consists of providing and furnishing 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 with discounted retainer rates, financial resources and tools, 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.

### **Analysis:**

Staff advertised an RFP for EAP services to include a cost analysis. Proposals were received from three (3) different EAP service providers. Although Deer Oaks EAP Services was not the lowest proposal, this provider offers six (6) employee requested counseling sessions in comparison to the lowest proposal that offers three (3) sessions. Deer Oaks EAP Services also has a network of 38 providers within a 25 mile radius of

Gadsden County that are available to provide services within two (2) days of initial contact and urgent services within six (6) hours. 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 190 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 \$4,104.00. The funds have been allocated in the 2016/2017 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 the service contract.
3. Board direction.

**County Administrator's Recommendation:**

Option 1

**Attachment:**

- Service Contract
- BID Tabulation Form
- Cost Sheet – Deer Oaks EAP Services
- Fact Sheet – Deer Oaks EAP Services
- Scope of Services Description – Deer Oaks EAP Services
- EAP Services RFP

**SOLUTIONS EAP**  
**EMPLOYEE ASSISTANCE PROGRAM AGREEMENT**

This **EMPLOYEE ASSISTANCE PROGRAM AGREEMENT (the "Agreement")** is effective on **October 1, 2016** 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 920, Quincy, FL 32351 (hereinafter referred to as "**The Company**").

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

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

- A** **The EAP** will provide and furnish assessment and referral services to employees of **the Company** and members of their immediate families and households who either have been referred to the EAP by **the Company** 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, through assessment, brief counseling and, when necessary and appropriate, a referral to a local provider for a course of treatment.
  - 2 To train **The Company** managers and other personnel with supervisory responsibilities 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, short-term counseling, up to six (6) counseling sessions per incident to employees, employee's family members, 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 working days of initial request for services.
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 in treatment of those employees referred for job performance problems; 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. Topics will also promote increased awareness of aspects of current laws as they apply to workplace/management issues.

**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 Company** and liaison with **The EAP** consultant.

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

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

The total annual sum of **\$4,104.00** 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 **200**.

**E** **The term of this Agreement shall be for 12 months, from October 1, 2016 through September 30, 2017.** 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.

**F** **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 or for a period no longer than the term of the original contract, whichever period is longer. Any extension may be accomplished by a letter from **GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS** to **THE EAP** prior to the September 30<sup>th</sup> deadline.

**GENERAL PROVISIONS:**

**A** 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.

- B** **The Company** 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.
- C** The obligations of **the EAP** under this Agreement shall not be assigned without the prior written consent of **the Company**.
- D** **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.
- E** The parties agree that **The EAP** is an independent contractor in performing its obligations hereunder. In no event will **the Company** 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 Company** under this Agreement. **The EAP** agrees to indemnify and hold **the Company** harmless against claims arising out of its own acts and omissions and the acts and omissions of its employees under this Agreement.
- F** **The EAP** shall maintain general liability and professional liability insurance with limits in the minimum amount of \$1,000,000, and shall name **the Company** as an additional insured under the policies. **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 caused this Agreement to be duly executed by their duly authorized representatives effective as of the 1<sup>st</sup> day of October, 2016.

**Deer Oaks EAP Services**

By: \_\_\_\_\_  
Paul Alan Boskind, PH.D, CEO, Owner

Date: \_\_\_\_\_

**GADSDEN COUNTY BOARD OF COUNTY COMMISSIONERS**

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



## BID TABULATION FORM

<b>BID TITLE:</b> EAP Services <b>BID NUMBER:</b> 16-13; Rebid <b>OPENING DATE:</b> 6-10-2016 <b>TIME OF OPENING:</b> 10:00 a.m.	<b>OPENED BY:</b> Shelia Faircloth <b>TABULATED BY:</b> Shelia Faircloth <b>VERIFIED BY:</b> Arthur Lawson, Sr. Page 1
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BIDDER LIST	BID AMOUNT	MET SPECS	NOTES
Tallahassee Memorial EAP 1613 Physicians Drive Tallahassee, FL 32308	\$6,200.00		
Dear Oaks EAP 126 E Main Plaza San Antonio, TX 78205	\$4,104.00		
New Directions Behavioral Health 4800 Deerwood Campus Parkway Suite 600-1A Jacksonville, FL 32246	(re-submission) \$3,720.00		
<b>Adjourned @ 10:10 a.m.</b>			

## Section 4: Cost Proposal

GCBOCC  
RFP No. 16-13



**Gadsden County  
Board of County Commissioners**

### Employee Assistance Program (EAP) Cost Sheet

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

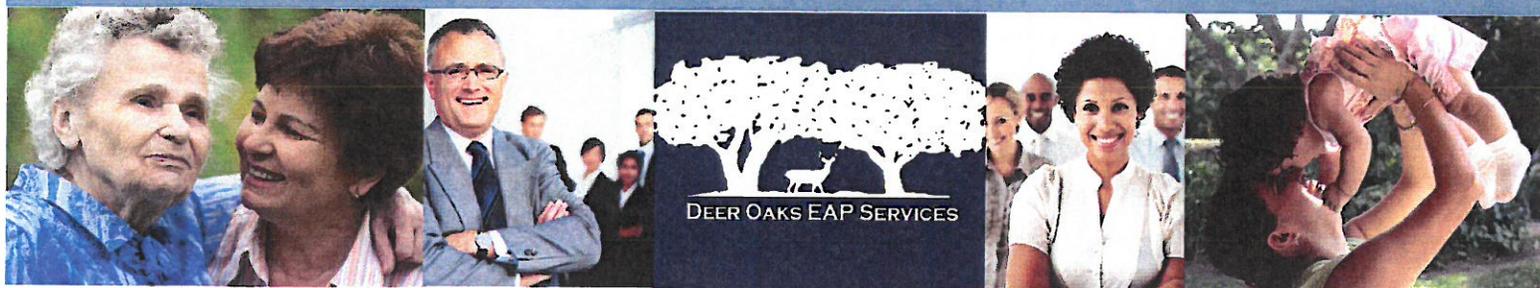
Number of Employees	200	
<b>DIRECT SERVICES PROVIDED:</b>	6	
Number of Sessions	3 – Employee Request 6 – Supervisor Referred	
		<b>Total Cost: \$ 2,954.00</b>
<b>CONSULTATION, TRAINING, AND GROUP ASSISTANCE</b>		
Supervisory/Wellness	6 Hours	
Employee Orientations	4 Hours	
		<b>Total Cost: \$ 900.00*</b>
<b>MATERIALS QUANTITY</b>		
Supervisory Packets	25	
Brochures	200	
Wallet Cards	200	
Color Posters	15	
		<b>Total Cost: \$ 250.00</b>
<b>ANNUAL TOTAL: Direct Service, Consultation, Training, &amp; Materials</b>		
		<b>Annual Total Cost: \$ 4,104.00/year</b>
Cost per Employee per Year	\$ 20.52 PEPY	
Cost per Employee per Quarter	\$ 5.13 PEPO	
Cost per Employee per Month	\$ 1.71 PEPM	

\* Training includes: 2 hours of on-site training from our 2016 Training Catalog and 10 hours of webinar orientations and training from our 2016 Webinar Catalog. Additional free training available through our website.

OPTIONAL SERVICES	
Critical Incident Debriefings	\$ 300.00 /per hour with a minimum of 2 hours per event
Return to Work Conferences	\$ 300.00 /per hour
Conflict Resolutions	\$ 300.00*/per hour

\*\* Cost for full-service mediation; conflict resolution through the mandatory referral process is included within the above PEPM cost.

# Deer Oaks EAP Services Fact Sheet



The Deer Oaks Employee Assistance Program (EAP) is a free service provided for you and your dependents by your employer. This program offers a wide variety of counseling, referral, and consultation services, which are all designed to assist you and your family in resolving work/life issues in order to live happier, healthier, more balanced lives. These services are completely confidential and can be easily accessed by calling the toll-free Helpline listed below.

## DEER OAKS EAP IS A RESOURCE YOU CAN TRUST.

**Eligibility:** All employees and their household members/dependents are eligible to access the EAP. Retirees and employees who have recently separated from their employer will continue to have access to services for up to six (6) months post-employment.

**In-person Counseling & Assessments:** A network of 54,000+ mental health providers throughout the United States are available to provide in-person assessment and counseling services to members wherever they may reside.

**Telephonic Assessments & Support:** All clinical EAP cases receive a thorough telephonic clinical assessment. In-the-moment telephonic support and crisis intervention is also available 24/7.

**Tele-Language Services:** Deer Oaks has the ability to provide therapy in a language other than English if requested. Services are available for telephonic interpretation in over 190 of the most commonly spoken languages and dialects.

**Referrals & Community Resources:** Counselors provide referrals to community resources, member health plans, support groups, legal resources, and child/elder care services.

**Advantage Legal Assist:** Free 30-minute telephonic consultation with a plan attorney; free 30-minute in-person consultation; 25% discount on hourly attorney fees if representation is required; unlimited online access to a wealth of educational legal resources, links, tools and forms; interactive online Simple Will preparation; access to state agencies to obtain birth certificates and other records.

**Advantage Financial Assist:** Unlimited telephonic consultation with a financial counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction and financial planning; supporting educational materials available; credit report review by a financial counselor and tips for improvement; objective, pressure-free advice; unlimited online access to a wealth of educational financial resources, links, tools and forms (i.e. tax guides, financial calculators, etc.).

**ID Recovery:** Free 30-minute telephonic consultation with an Identity Recovery Professional; customized action plan and consultation; ongoing ID recovery guidance available as needed; free credit monitoring service through Credit Karma.

**Monthly Electronic Newsletters:** Employees and supervisors receive monthly e-newsletters covering a variety of topics including health and wellness, work/life balance issues, conflict resolution, leadership, and more.

**Disaster Assistance Program:** Educational articles on how to help children cope with disasters; consultation to Employer Group Management Personnel regarding disaster readiness; and training for developing workplace violence prevention plans.

**Online Tools & Resources:** Log on to [www.deeroakseap.com](http://www.deeroakseap.com) to access an extensive topical library containing health and wellness articles, videos, archived webinars, child and elder care resources, and work/life balance resources. The Deer Oaks website also includes a wealth of information for supervisors with topics covering conflict resolution, leadership, motivation, and more.

**Work/Life Services:** Work/Life Consultants are available to assist members with a wide range of daily living resources such as pet sitters, event planners, home repair, tutors and moving services. Simply call the Helpline for resource and referral information.

**Find-Now Child & Elder Care Program:** This program assists participants caring for children and/or aging parents with the search for licensed, regulated, and inspected child and elder care facilities in their area. Work/Life Consultants assess each member's needs, provide guidance, resources, and referrals within 12 hours of the call. Searchable databases and other resources are also available on the Deer Oaks website.

**Critical Incident Stress Management:** Traumatic events can be extremely disruptive to the well-being and productivity of employees. Deer Oaks will respond quickly when asked to provide Critical Incident Stress Management Services for any major company incident.

**Take the High Road:** Deer Oaks reimburses members for their Lyft and Uber fares in the event that they are incapacitated due to impairment by a substance or extreme emotional condition. This service is available once per year per participant with a maximum reimbursement of \$45.00 (excludes tips).



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.

## SCOPE OF SERVICES OVERVIEW

# SCOPE OF SERVICES DESCRIPTION

### Employee/Dependent Access

<b>Confidentiality</b>	Deer Oaks preserves client confidentiality at all times in accordance with the Employee Assistance Professionals Association (EAPA) Code of Ethics; Health Insurance Portability and Accountability Act (HIPAA); other relevant professional guidelines; and the law. Client confidentiality will be respected except in those instances where precluded by law, precluded by medical or professional ethics, breached by a violation of program rules or under a signed release from the employee.
<b>Eligibility</b>	All employees, dependents, and household members are eligible to access the EAP starting on day one of the contract regardless of whether they are or are not covered under other mental health service plans. Employees and retirees who terminate their employment for any reason will have continued access to the EAP for six (6) months post-employment.
<b>24/7 Access</b>	<ul style="list-style-type: none"> <li>• Availability 24 hours per day, 7 days per week, 365 days per year via the toll-free Helpline, iConnectYou Smartphone App and online via LiveCONNECT instant messaging (live chat with a Work/Life Consultant)</li> <li>• Helpline is answered "live" 24/7 by EAP and Work/Life Professionals - <i>members will never reach an automated voice messaging system, phone tree or general customer service representative</i></li> <li>• Toll-Free TTY Service for the Hearing Impaired and language line</li> <li>• Master's level Clinicians are always available for immediate in-the-moment support</li> </ul>
<b>Intake/Short-term Counseling</b>	
<b>Telephone Triage</b>	Telephone Triage conducted by Work/Life Consultants to assess initial care management needs and appropriate referrals. Work/Life Consultants gather demographic information and through a series of routine questions, screen for risk, identify the presenting problem(s), and triage participants to the most appropriate resource(s) to meet their needs and preferences i.e. clinical team for assessment, referral and/or crisis intervention; health plan or community resource referral; connect with our Work/Life Specialists or legal and financial experts; or referral to other benefit plan resources i.e. wellness program, disease management, etc.
<b>In-the-Moment Telephonic Support</b>	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. An in-person appointment with a local EAP Specialist or crisis intervention center is offered and/or the participant is assisted with hospitalization if needed.



**Telephonic Assessments**

All clinical calls receive an in-depth telephonic assessment by an EAP Counselor. The telephonic clinical assessment focuses on psychosocial factors to determine the need and urgency for an appointment. The assessment identifies and clarifies presenting problems as described by the employee, relevant background history, initial goals, and current risk factors.

**Appointment Scheduling**

Following the assessment, if it is determined that an in-person appointment is needed, 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 counselor-client matching (gender, ethnicity, religious preference, etc.). The following indicates the timelines for confirmed referrals and appointments by standard, urgent and emergent cases.

- **Standard** – A counselor is appointed within two (2) 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. The member is then responsible for calling the referred provider to schedule his/her appointment.
- **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. The case manager develops a safety plan with the member and a confirmed match referral to a provider is provided within six (6) business hours. The provider must have appointment availability within two (2) business days of the initial contact with the EAP.
- **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. Subsequent appointments are available following the employee's stabilization.

**Affiliate Network of Counselors**

Deer Oaks maintains an extensive national network of 54,000+ counselors located in every state and Puerto Rico including *709 providers in the State of Florida and 38 providers within a 25-mile radius of zip code 32351* available to provide in-person counseling services to employees and their family members. All of our providers go through a strict credentialing and re-credentialing process and must possess at minimum a Master's degree in a mental health discipline, three years minimum post master's experience in the direct provision of clinical care and a current and unrestricted license as a mental health practitioner at the independent practice level. Many of our providers have specialized training in substance abuse assessment, treatment, mental health, and marriage and family counseling.

**Advantage of an Affiliate Provider Network Model versus a Staff Office Model**

Our affiliate provider network includes counselors that range in age, gender, ethnicity, race, expertise, treatment specialty areas and language capabilities. Utilizing a diverse network model in the provision of counseling versus a staffed office model ensures that we are able to match each individual accessing services with a provider that best meets his/her clinical needs and preferences in relation to ethnicity, religion, gender, and language. It also offers greater confidentiality. Because we have more than 38 providers to refer to in the area, employees are less likely to be referred to the same counselor and therefore will not encounter each other arriving or leaving an appointment. In our experience, trusting that the EAP is confidential is one of the most important reasons why



individuals choose to access the EAP versus their medical plan or other employer-sponsored benefit and leads to greater program utilization.

**Short-term Counseling-**  
Up to 6 sessions per issue per year included for both self-referrals and management/mandatory referrals

Deer Oaks offers individual, family and marital short-term, face-to-face counseling sessions for a variety of issues such as occupational, grief, family, stress, and chemical dependency. *In-person, telephonic, online and video counseling is available.* 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.

**Case Resolution within the EAP**

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 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 (i.e. daily living, legal, financial, child/elder care). Through the enhanced six-visit EAP model, the County's case resolution within the EAP will increase. The higher resolution rate will minimize the number of individuals that need to be referred into the County's health plan for ongoing counseling, and help to return employees to higher levels of productivity as quickly as possible.

**Clinical Case Management/Follow-up**

100% of clinical EAP cases are overseen by a case manager who is responsible for managing the progress, quality, and clinical content of the counseling. The case manager interacts with the face-to-face counselor at the beginning phase to establish the treatment focus and follows-up telephonically at prescribed intervals during the case process to ensure quality. The case manager reviews the suitability of the referral as well as the client's progress toward goal attainment. At the conclusion of the case, the case manager reviews the case again, and discusses the employee's overall satisfaction as well as any onward referrals and resources that may be appropriate.

**Referrals**

Counselors provide referrals as clinically needed to the employer group's health plan, community resources, legal resources and attorneys, child/elder care resources, and financial counselors/planners. Deer Oaks maintains a referral network of community resources to facilitate referrals outside of the EAP and coordinates with other health and wellness vendors when needed.

**Work/Life Services**

**Advantage Legal Assist**

- Easy access to EAP, legal and financial services via the Helpline
- Free 30-minute telephonic advice consultation with an attorney
- Free initial 30-minute in-person consultation with an in-plan attorney; *93.60% of EAP participants resolve legal matters within this free consultation*
- 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

**Advantage Financial Assist**

- Free unlimited telephonic consultation with a financial counselor qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction and financial planning
- Supporting educational materials available
- Credit report review by a financial counselor and tips for improvement
- Financial articles included in monthly newsletters

<p><b>Advantage Legal &amp; Financial Online Resources</b></p>	<ul style="list-style-type: none"> <li>▪ Unlimited online access to a wealth of educational legal and financial resources, links and tools</li> <li>▪ Interactive Online Simple Will- create a legally-binding simple state-specific will at no cost through a step-by-step online “interview process”</li> <li>▪ Access to state agencies to obtain birth certificates and other records</li> <li>▪ Links to tax guides, the current year’s tax forms and financial calculators</li> <li>▪ Self improvement “Task Builders” for interactive financial improvement</li> </ul>
<p><b>Free Online Credit Monitoring</b></p>	<ul style="list-style-type: none"> <li>▪ Free credit reports and credit monitoring program available via the legal/financial website</li> <li>▪ Free registration- no service level or payment plan required</li> <li>▪ Receive email alerts regarding changes to your credit accounts</li> </ul>
<p><b>Work/Life Balance- Work/Life, daily living, child care and elder care services</b></p>	<ul style="list-style-type: none"> <li>▪ Work/Life Consultants consult with members regarding their Work/Life needs, streamline searches, and provide a list of up to 3 referrals per request within three (3) business days for standard work/life cases and within 6 business hours for urgent cases- <i>the industry's fastest turnaround time</i></li> <li>▪ Includes consultation and resources for child care, elder care, and daily living issues i.e. adoption, parenting, education, pet sitters, moving services, home repair, etc.</li> <li>▪ Online Work/Life Resource Locators</li> <li>▪ Retiree Assistance Program provides counseling, legal, and financial referrals to retirees post-retirement</li> </ul>

**Training Services**

<p><b>Training Methodology</b></p>	<p>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 trainings, 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.</p>
<p><b>Training</b> 2 hours of on-site orientations and training from our 2016 Training Catalog and up to 10 hours of webinar orientations and trainings from our Webinar Catalog</p>	<p>Deer Oaks offers Employee Orientations, Supervisor Orientations, Supervisor Training, Work/Life Seminars, Professional Development Seminars, Alcohol/Substance Abuse Education &amp; Awareness Seminars, Healthy Living Program Seminars, and Health Fair Participation. More than 100 educational seminars are available in the following categories: People Management, Caregiving, Financial, Legal, Wellness, Personal and Professional Development. Sessions are delivered in face-to-face seminar or online webinar formats. <i>Our 2016 Training Catalog (up to 2 on-site training hours included) is provided in <a href="#">Tab 5F</a> and our 2016 Webinar Catalog is provided in <a href="#">Tab 5G</a> for your review.</i></p>
<p><b>Culture of Respect 3-Part Training Series</b></p>	<p>Developed by our Director of Business Development &amp; Training, Greg Brannan, this seminar series is designed to assist the County in creating a climate of respect in the workplace, one that appreciates and leverages diversity and differences. Topics include: <i>Building a Culture of Respect, Strengthening the Team</i> and <i>Communicating Effectively with a Diverse Team</i>. This training supports the County's Human Resources goal related to creating a safe, discrimination-free work environment.</p>
<p><b>On-Demand Webinars</b> Unlimited access included</p>	<p>In addition to our catalogs, Deer Oaks also offers on-demand webinars through <a href="http://deeroakseap.com">deeroakseap.com</a> that may be accessed at any time for individual or group training at home or work. A new on-demand online seminar is added monthly.</p>



**Online Skillbuilder Training Courses**  
*Limited access included*

Our 18 skillbuilders combine valuable training with the ease and flexibility of learning online. These 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. They 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.

**Quarterly Supervisor Excellence Webinar Series** (free to County employees)

This is a free quarterly webinar series presented by our Director of Training, Greg Brannan, designed to provide supervisors and managers with enhanced skills to improve workplace morale, employee motivation and staff productivity. The topics for 2016 include: *The Fundamentals of Human Resources for Managers, How to Effectively Coach Employee Performance, Communicating Effectively with a Diverse Team, and From Buddy to Boss.*

**Orientation DVDs and Pre-Recorded Orientation Webinars**

The County may utilize our archive of on-demand seminars, online skillbuilders, pre-recorded EAP orientation links, orientation DVDs and our free quarterly *Supervisor Excellence Webinar Series* to facilitate simultaneous training at various facilities or individual training at times convenient for your employees. These additional on-line training options do not count toward your bank of on-site hours.

**Management Assistance Program**

**Signature Series Account Management**

Deer Oaks assigns a designated Account Manager to each client. Your Account Manager, Kira Rogers, Psy.D is a licensed Psychologist and will be responsible for the overall contract management and day-to-day service of the County's contract. She will consult and collaborate with County staff and other healthcare providers to enhance employee well-being and promote the value proposition.

Dr. Rogers is available via phone and email to consult with you as needed on a daily basis and will conduct formal quarterly utilization review meetings, which will include review of utilization data, discussion of trends, suggested specialized programming and/or support based on program usage, presenting problems, organizational strategies and goals and discussion of any issues or concerns. Through our high-touch account management approach, we ensure that our clients receive the time and attention they deserve, while supporting each client's unique and changing needs.

**Supervisor Mandated Referrals**

Deer Oaks provides assistance to managers in making Management Directed/ Mandatory Referrals to the EAP and responds quickly to all mandatory referrals. Follow-up assessment/compliance reports are provided to the employer's point of contact within the limits of the professional confidentiality regulations. Deer Oaks will also provide training to management on the mandatory referral process and is available to provide management consultations throughout the contract term on this and other issues facing managers and supervisors.

**Return to Work Conferences**  
*Available on a fee-for-service basis*

For mandatory referrals that require a return-to-work contract, Deer Oaks will follow its mandatory referral procedures, provide case management, progress reports at clinically appropriate periods during the referral /treatment process and schedule a return-to-work session at case closure. The provider will make his recommendations and complete the return-to-work contract for the employee/County. If the employee requires additional sessions/follow-up beyond the EAP referral, we will provide a referral to his health plan or other community resources as appropriate.



**Critical Incident Stress Management Services-** Available on a fee-for-service basis with a minimum of two (2) hours per event

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 approach follows the latest findings regarding clinically appropriate responses to critical incidents including the Mitchell Model and Psychological First Aid. EAP Specialists are available within 24-72 hours of the critical incident to provide group critical incident stress debriefings with recommendations for follow-up treatment. These interventions are customized to meet the needs of various employee groups.

**Attendance at Health Fairs-**included in bank of two (2) on-site training hours with additional hours available on a fee-for-service basis

Attendance at the County's 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. Oftentimes, if permitted by the employer, we will supply giveaway items, items for raffle or door prizes as incentives to attend the event and to learn more about the EAP. We also provide collateral materials for employees to take with them along with stress balls, key chains, and pens.

**Conflict Resolution/Mediation Services**

- o Conflict Resolution: two-party counseling via a formal mandatory referral- *included in proposed rates*
- o A 30-minute in-person mediation session with an attorney qualified as a mediator- *included within our Legal Assist Program*
- o Full-service in-person mediation service with a qualified mediator; the mediator meets with each party separately and then jointly, establishes an action plan and follows up- *fee-for-service*

**Telephonic Management/Organizational Consultations-** Unlimited included

Deer Oaks offers support services to managers and supervisors in dealing with difficult workgroup issues. *Unlimited telephonic supervisory, management, and human resources consultation* is available to provide guidance regarding issues, policies, practices and events that affect behavior in the workplace. Our comprehensive management consultation process offers strategic solutions and practical advice that can open the path for healthy workplace communications and systems

**Program Promotion**

**Online Tools and Resources at [www.deeroakseap.com](http://www.deeroakseap.com)**  
  
*Unlimited access included*

Members will have access to an 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. Members will receive an established organization-specific username and password to access the site.

**Engagement Engine Work/Life Demo Link:**  
[https://www.advantageengagement.com/1601/login\\_company.php](https://www.advantageengagement.com/1601/login_company.php)  
  
**Login: deeroaks Password: deeroaks**

**Promotional Materials**

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. Electronic promotional materials are provided on an on-going basis. Other materials include orientation DVDs, 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 the County's requests.

**Monthly Employee and Supervisor Newsletters**

Monthly Employee and Supervisor Electronic Newsletters are distributed to our client points of contact and uploaded onto our website. Employee Newsletter topics include, but are not limited to: stress management, health and wellness, financial issues, and Work/Life balance. Topics for Supervisor Newsletters include, but are not limited to: tips on being an effective supervisor, leadership, and employee engagement.

**Other Services/Program Components**

**Tele-Language Services**

Telephonic interpretation in 200 of the most commonly spoken languages and dialects is available for the Deer Oaks' Helpline. We also have Helpline staff that is multilingual and multicultural. 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. The successful match occurs in 98% of the members served. In the 2% of cases where there is not an available provider to speak the preferred language, we provide bridge counseling via the translation service, while we are identifying an affiliate with the appropriate clinical credentials and language fluency.

**Take the High Road Program**

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).

**Fitness-for-Duty Consultation & Referral**

Deer Oaks provides expert telephonic consultation dealing with decisions regarding the need for a Fitness-for-Duty (FFD) Evaluation and can assist in recommending a FFD facilitator and coordinating a referral to the provider. However, the employer is solely responsible to decide whether to refer an employee for a Fitness-for-Duty Evaluation. The County is responsible for working directly with the FFD provider, as well as paying for the Fitness-for-Duty Evaluation directly.

**DOT Substance Abuse Professional (SAP) Evaluations- fee-for-service**

Deer Oaks follows the standards for SAP services as stipulated by the Department of Transportation- 49 CFR Part 40 and makes recommendations concerning education, treatment, follow-up testing, and aftercare. In support of the County's Drug-free Workplace Program, Deer Oaks will coordinate a referral to a DOT Substance Abuse Professional (SAP), who will complete the following: conduct an initial assessment of the employee referred; determine the appropriate recommendations (i.e. inpatient or outpatient treatment, support/self-help meeting, etc.); explain the treatment options to the employee; monitor the employee's compliance with the treatment; provide a follow-up testing schedule for that employee; provide compliance reports and a case closure letter; follow all DOT regulations and guidelines.

**Program Evaluation**

**Utilization Review Reports**

Standard utilization reports are provided electronically each quarter and annually and include information requested by the County without infringing on member confidentiality. Your Account Manager reviews these reports on an on-going basis to identify trends that may indicate a need for specialized support.

**Focus Administrative Website**

Through this website, County personnel will be able to track utilization and run canned reports on demand (1 login/password provided).

**IVR-Based Satisfaction Survey**

To measure employee satisfaction, we survey employees who have received support. Our Interactive Voice Response (IVR)-based satisfaction survey is comprised of three questions and also allows members to leave detailed comments via voicemail at survey

end. Since implementing the survey a year ago, we found a significant increase in the number of responses previously received from longer satisfaction surveys.

The easy-to-complete survey is first offered to users live at the end of their initial phone call with a counselor or work/life consultant. This allows us to track customer satisfaction regarding the responsiveness, professionalism, and helpfulness of our staff. When a participant's case has been closed, a survey is again made available to allow participants the opportunity to provide feedback on services/referrals they have received. Currently, we are only able to report the IVR-based survey results for our book-of-business.

***Online Satisfaction Survey***

In addition to the IVR-based survey, we also provide access to an online member satisfaction survey. We welcome members' reactions and feedback regarding a variety of satisfaction issues, including the location and convenience of offices, the efficiency and attitudes of the staff, and the effectiveness of the counseling. The satisfaction survey is available on our website and each member is encouraged to login and complete the survey upon case closure. The results of member satisfaction surveys for each client are included on utilization reports when available (based on member completion rate).

***Quality Assurance/ Program Evaluation***

ISO 9001:2008 Certification, Case Management & Follow-up Procedures, Satisfaction Surveys, Verbal and Written Feedback Regarding Trainings, Promotional Effort Review, Silent Monitoring of Helpline Calls, EAP Case Reviews, Work/Life Case Reviews, Grievance Procedures, Provider Complaints, Data Systems & Security, Clinical Outcomes, Discussion with County Management and EAP Staff; online participant satisfaction survey, training survey and additional follow-up activities

**Request for Proposal**  
**RFP No. 16-13**  
**Employee Assistant Program (EAP)**

The Gadsden County Board of County Commissioners is seeking sealed proposals from qualified EAP service providers to provide counseling and training services to the employees of the Gadsden County BOCC. Proposals will be received until 10:00 on Friday, May 13, 2016 in the Management Services Department, 5-B E. Jefferson Street, Quincy, FL 32351 and opened thereafter in the County Administrator's Conference Room, 9-E. Jefferson Street, Quincy, FL 32351. Specifications may be obtained from the Management Services Department, at 5-B E. Jefferson Street, Quincy, FL or by dialing 850-875-8660. The RFP can be downloaded from our website at [www.gadsdengov.net](http://www.gadsdengov.net). Questions concerning the specifications should be directed to Arthur L. Lawson, Sr. at 850-875-8660. Proposals will not be valid if not sealed in an envelope marked "SEALED PROPOSAL" and identified by the name of the EAP services provider, proposal number and time of opening. The Gadsden County Board of County Commissioners reserves the right to reject any one proposal or all proposals, any part of any proposal, to waive any informality in any proposal, and to award the project in the best interest of the County. Any person requiring a special accommodation because of a disability should contact the Management Services Department at least five (5) days prior to the proposal opening. EEO/AA.

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