



# User's Manual for Employee Assistance Program



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<b>Services Provided</b>	<b>EAP Full Service</b>	<b>EAP Performance</b>	<b>EAP Options</b>
<b>Household Aggregate Model:</b> Four sessions per household member. No household will have less than eight sessions. Sessions may be combined by the household and used as they see fit.	✓	✓	✓
Highest confidentiality	✓	✓	✓
Face-to-face counseling	✓	✓	✓
Web-based counseling	✓	✓	✓
Financial counseling	✓	✓	✓
Legal counseling	✓	✓	✓
24/7 crisis counseling	✓	✓	✓
CD evaluations and education	✓	✓	✓
Wellness, education programs	✓	✓	✓
Personal health risk assessment	✓	✓	✓
Website (unlimited access)	✓	✓	✓
Employee newsletters	Monthly	Monthly	Quarterly
Supervisor newsletters	✓	✓	✓
Posters (hard copy), e-promo	✓	✓	✓
Employee orientation	✓	✓	✓
Supervisor orientation	✓	✓	✓
Unlimited access to Supervisor Helpline	✓	✓	✓
Formal referral for job performance	✓	✓	*
Formal referral for DFWP/DOT	✓	✓	*
Customized employee and management training—two hours per 100 employees	✓	✓	*
E-training	✓	✓	*
Consulting	*	*	*
Executive Level Services	*	*	*
Concierge Services	*	*	*
Utilization reports	✓	✓	✓
Crisis Management Services	Covered under training hours	Covered under training hours	✓

\* Purchase separately at a reduce rate through your EAP contract.

## Welcome to The Village Business Institute

We are pleased you selected The Village Business Institute (VBI) to provide you with a quality Employee Assistance Program. Established in 1972, VBI's Employee Assistance Programs are worksite-based services that help employers and their employees to be more productive and satisfied on the job. Today, VBI's Employee Assistance Programs serve hundreds of companies and thousands of employees throughout the United States, Canada, Mexico, and internationally, continuing to make it easier for employees to get help when they need it. As a nationwide EAP company of distinction, we are committed to providing your organization and its employees with the following:

- **Choices and options.** VBI provides multiple EAP contract options so you can choose the level of service you need.
- **No barriers to service.** VBI's Employee Assistance Programs are value driven to get service to your employees quickly.
- **Face-to-face personal counseling.** VBI provides face-to-face counseling to your employees—wherever they are— because of the effectiveness of face-to-face counseling in assessing and addressing problems.
- **Unlimited toll-free access to Supervisor/Human Resource Helpline.** Your supervisors can deal with employee issues quickly and efficiently before they escalate.
- **Financial counseling.** Financial issues are often at the root of employees' problems. VBI's Employee Assistance Programs include financial counseling as a core employee benefit.
- **We have our own people.** VBI's Employee Assistance Program has its own dedicated staff of professionals who provide the highest quality of counseling, training, consulting, crisis management, and case management services. Because of the flexibility of our professional staff, VBI delivers a level of quality that is difficult to match.
- **Monthly or quarterly employee newsletters.** In addition to valuable information, VBI newsletters are another way we encourage employees of member companies to seek counseling when issues arise.

We designed this EAP User's Manual to introduce you to the internal operation of our EAP and how we work for you and your employees. This manual is a helpful resource; please review it thoroughly. If you have any additional questions, contact your account executive.

## Services VBI Provides

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### Contact Information

- **Online**

Visit [www.villageeap.com](http://www.villageeap.com) or [www.TheVBI.com](http://www.TheVBI.com)

- **Telephone**

Call VBI to speak with an EAP Professional, 1-800-627-8220

### Household Aggregate Model

VBI's Employee Assistance Program shall make available to each covered employee a quantity of sessions equal to the number of household members times (x) 4. (Example: 5 household members times (x) 4 sessions per equals 20 available sessions for the household to use as they see fit.) No household will have less than 8 available sessions. There is NO per incident restriction on use of sessions.

### Highest Confidentiality

VBI's Employee Assistance Program policy is that Village employees will not discuss any information, including identity, about their clients, with any non-Village staff, without your written authorization. It is in our best interest to abide by the highest possible standards. Our success hinges on your confidence that The Village respects individual privacy and adheres to the highest possible standards of confidentiality.

In addition to our agency policies, EAP counselors are bound by ethical and legal standards set by the professional organizations they belong to, and the licensing bodies of those organizations. This high standard of confidentiality applies to all EAP counselors, including those in private or group practice.

## Employee Services

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- Face-to-face counseling
- Web-based counseling
- 24/7 crisis counseling
- Financial counseling
- Legal counseling
- Chemical dependency evaluation and education
- Wellness education programs
- Health Risk Assessment
- Unlimited access to website for additional resources/services
- Employee newsletters
- Employee orientations
- Training solutions
- E-learning

We have master's level counselors available 24 hours a day, 365 days a year. No matter when a client calls, a counselor is available to speak with them. Our lines are staffed by Village EAP intake staff Monday, Tuesday, and Thursday from 8 a.m. to 9 p.m. CST and Wednesday and Friday from 8 a.m. to 5 p.m. CST. If a client calls during business hours our staff will answer questions, make appointments, or set up any other services

needed. If a client calls and has an urgent situation, intake staff will connect them with one of our counselors for immediate phone consultation. If a call comes in after business hours the client can choose to talk with a qualified crisis counselor. If it is a routine call, the client can leave a message and we will contact them the next business day.

Our VBI Employee Assistance Program provides services for many concerns, for example:

- Personal, family, and marital issues
- Stress, anxiety, depression
- Chemical dependency issues
- Workplace stress
- Personal wellness

### **Counseling**

Employees or their household members seeking EAP services will be set up with a qualified counselor who will assist them with their concerns. If they are seeking a counselor for clinical or relationship issues, they will be set up for a face-to-face session, which is typically what most employees prefer. If face-to-face does not work for the employee or their household member, web based and telephonic counseling is available. In the first counseling session, a well-being assessment will be completed that will look at the psychological, social, and emotional issues that maybe impacting the employee's health, relationships, and/or ability to perform their job. The counselor will then assist them in developing an action plan to address their concerns.

When an employee or household member has financial concerns, they will be set up for an appointment with a certified financial counselor. Those sessions can take place face-to-face, web-based, or telephonically. The financial counselor will take them through an assessment of their personal finances and help them with developing a plan to address their financial issues.

Addiction assessments will be scheduled with licensed or certified [depending on the state] addiction professionals. All sessions will be scheduled as face-to-face appointments. The addiction professional will complete an assessment and make recommendations regarding education and/or treatment.

Legal consults are telephonic appointments as we have a network of attorneys—each is licensed in the state in which they practice law. This provides the employee or household member the opportunity to discuss their concerns with an attorney that understands local laws pertaining to their question.

Nutrition counseling is available to employees who complete the EAP online Health Risk Assessment [HRA]. Sessions can be either web-based or telephonic, and the nutrition counselor will review with the employee their HRA and provide health-related recommendations.

VBI's employee assistance services are robust in both variety and depth of services, and most employees or their household members are able to get their needs met in the scope of services offered. In those situations where chronic mental illness or emergency mental health needs are identified, the EAP counselor will assist the employee or household member in accessing the right resources to meet their needs.

## **Referral**

On those occasions when long-term or emergency services are needed, our EAP counselors will help the employee or household member to access the level of care they need. A typical scenario is when an employee is suffering from a severe episode of depression and is a candidate for a trial of medication. Our EAP counselor will assist them in finding a psychiatrist or clinical nurse specialist (in their insurance network or available through community resources) that can provide a medical evaluation. The EAP counselor, with the employee's permission, will provide their assessment, treatment, and referral recommendations to the medical provider, and will be available to provide follow-up counseling services.

In situations of chronic mental illness, our EAP counselor will help the employee or household member connect with psychological or psychiatric services (within their medical insurance network) that can provide clinical diagnosis and long-term treatment options. EAP counselors will also help employees or household members locate and connect with community resources that can help manage and treat long-term mental illness.

Employee assistance addiction professionals making referrals to addiction treatment programs will assist the employee or household member in finding viable treatment options within their medical insurance network. If the employee or household member is uninsured or underinsured, the addiction professional will assist them in finding a low- or no-cost community provider of addiction treatment services.

If legal counsel recommends the employee or household member meet face-to-face with an attorney, they will provide a referral to an in-network attorney that will give a 25% discount on legal services.

## **Follow-up**

Knowing employees and their household members are getting what they need from their EAP is very important to us. With the employee's permission, VBI will follow-up with a satisfaction survey. The survey will give them an opportunity to comment on the availability and usefulness of services. Some employees will also receive an outcomes questionnaire as part of our ongoing effort to research the effectiveness of EAP services in helping employees improve health, relationships, and performance at work.

Additional follow-up can also be triggered by missed appointments, urgent concerns, or part of the EAP counselor's ongoing treatment plans with employees or household

members. As with all EAP services, the rules of confidentiality also apply to follow-up services.

### **Availability**

At VBI, we have our own licensed EAP counselors, licensed addiction counselors, NFCC certified financial counselors, crisis response professionals, consultants, and trainers. In addition, we have a national affiliate network of licensed EAP counselors and addiction professionals. We also have counseling and addiction providers in Canada and Mexico, and have the ability to arrange appointments in other international locations. Our network of emergency counselors is available via phone 24 hours a day, 365 days a year. Web-based counseling is also available in some states and is being expanded as licensure allows.

Our program is designed, and it is our promise to provide, your employees and their household members with a quality, readily accessible, network of counselors.

### **Financial Counseling**

The Village Financial Resource Center counselors are certified through the National Foundation for Credit Counseling. All employees and their household members are entitled to this benefit. Whether you are deep in debt, or just want to plan for the future, financial counseling will give you the tools you need to successfully execute your financial action plan. All employees will have access to The Village Debt Management Program, Financial "Well- Check-ups," and the "Financial Starter Road Map" financial planning tool.

### **Legal Counseling**

Legal consultation services are provided through VBI's EAP. Services are provided by licensed, practicing attorneys who are members of the Bar Association. Employees receive a half-hour consultation without charge. Consultations occur telephonically or can possibly be arranged face-to-face. Employees needing legal assistance beyond the initial consultation can choose to receive it from a network attorney at reduced rates (up to a 25% discount). Employees can receive information on topics ranging from civil to family law.

### **CD Evaluations and Education**

We are here to help if there are questions about how alcohol/drug use might be impacting relationships or work life. Chemical dependency evaluations are available as part of your EAP benefit and counselors are available to provide support and education. We can also answer any questions you may have about how alcohol/drug use might be impacting relationships or work life.

### **Wellness Education Programs**

Employees and their household members can use their EAP sessions to take a variety of educational classes. Those include but are not limited to:

- Smoking cessation
- Parenting
- Couples relationship
- Anger management
- Financial Starter Roadmap

The client is asked to call VBI's EAP for approval of the requested class.

### Health Risk Assessment

VBI's Employee Assistance Program provides employees and household members with a personal Health Risk Assessment [HRA] and other tools to help better understand health status and identify areas for improvement. A series of questions will be asked that will take approximately 15 minutes to complete. When finished, the individual will immediately receive (via pdf) a wellness score and a personalized report that includes information and action steps for optimizing their health. The information collected, and the results of the HRA, contain confidential health information and will not be shared.

### Website Resources

#### To access:

1. Go to [www.villageeap.com](http://www.villageeap.com)
2. Enter username (name of company)

Supervisors, Managers, Human Resource, Employees and Household members have access to online services provided through [www.villageeap.com](http://www.villageeap.com). The following links can be found on the website:

- **Newsletter Sign-up**
- **Employee Resources**
  - Introduction
    - Welcome Video
    - Privacy/Confidentiality
    - Who is covered?
    - Accessing The Village EAP
    - Wallet Card
    - Employee Newsletters
  - Child Care/Elder Care Resources
    - More Information
    - Child Care Checklist
    - Child Care State Links
    - Elder Care Choices
    - Elder Care State Links
  - Employee Services
    - Drug/Alcohol/Tobacco Issue—Drinker's Check-up
    - Emotional Issues
    - Financial Services

- Legal Services
- Relationship Issues
- Workplace Issues
- Tax Resources
- Veterans Resources
- Wellness Resources
  - Health Risk Assessment
  - Access to a Nutrition Counselor
- FAQ
- **Employer Resources**
  - Introduction
    - Supervisor Orientation
    - Supervisor's Guide
    - Supervisor Newsletters
    - EAP Connection (Check Stuffers)
  - Employer Services
    - Crisis Management Services
    - Fee-Based Services
    - Leadership Library
    - Supervisor Helpline
    - Supervisor Referrals
    - Training Solutions
  - Seminar Sign-Up
  - Supervisor Referrals
  - Supervisor Resources
  - FAQ
- **Affiliate Resources**
  - Introduction
  - Provider Forms

Access additional resources regarding the following topics, and many others, on our website:

- **Adoption**
- **Alzheimer's Disease**
- **Autism**
- **Eating Disorders**
- **Learning Disorders**
- **Men's Health**
- **Parenting**
- **Pet Care**
- **Pregnancy**
- **Women's Health**

## Employee Newsletters

The Village Business Institute's Employee Assistance Program creates and distributes electronic or hard copy newsletters to all employees who have access to our services. We do this not only to provide you with information and articles we think may be useful and interesting, but also to remind you, your household members, and your co-workers of the services we have available—so if a time comes when you would like to contact us, you know where to call.

## Employee Orientation

The Village Business Institute offers three ways for an employee to get familiar with the EAP benefit.

- Face-to-face. Call your account executive to schedule an employee orientation.
- DVD. Orientation DVD's are provided.
- Online. Orientations can also be accessed on our website at [www.villageeap.com](http://www.villageeap.com) under Employee Resources, Introduction and Welcome Video. The employee will also find other introduction information here as well.

## Training Solutions

The Village Business Institute's team of professional trainers provide comprehensive training solutions to help you build and maintain a high-performing and engaged workforce. VBI provides training for employees, supervisors, and managers as part of any performance or full-service Employee Assistance Program contract. Additional hours may be purchased at an EAP reduced per hour fee. Hourly, half-day, and full-day workshops are available. To schedule a training for your work group, please contact our client services supervisor at 1-800-627-8220 or by emailing [vbitraining@thevillagefamily.org](mailto:vbitraining@thevillagefamily.org).

## E-learning

In order to provide flexible, mobile, and cost-effective training, VBI launched an online training solution through the Teneo Online Learning System. We provide top-notch courses that are interactive and engaging, and allow individuals to easily access these courses from anywhere, anytime. If you are interested in accessing our online courses for yourself or your organization, contact [vbitraining@thevillagefamily.org](mailto:vbitraining@thevillagefamily.org).

If you already have a login and password, click on this link to begin taking your courses: <http://service.teneolearning.com/vbi/>

## Employer Resources

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This section describes these employer/organizational services:

- Dedicated account executive
- Supervisor newsletter
- Communication materials
- Supervisor orientation
- Supervisor Helpline
- Supervisor referrals for job performance, DFWP/DOT
- Customized employee and management training
- E-learning
- Crisis management services
- Utilization reports
- Outcomes data

### Dedicated Account Executive and Support Team

The Village Business Institute will provide a dedicated account executive for your account, with direct phone line, cell phone and e-mail accessibility to that person. The dedicated account executive will also be available for face-to-face meetings as arranged. The client services supervisor will be available via telephone and e-mail to help you manage your EAP. You will also have unlimited toll-free access to our Supervisor/Human Resource Helpline to help deal with employee issues quickly and efficiently before they escalate. A non-dedicated account executive will also be available should the need arise. If your dedicated account executive is not available, our front desk receptionist is instructed to direct you to the client services supervisor, director, clinical manager, a non-dedicated account executive, or to one of our consultants/trainers.

If a situation escalates to the point where you or one of your employees needs to speak to a counselor immediately, VBI staff will connect you to a counselor for immediate phone consultation. If a call comes in after business hours, you can choose to talk to a qualified crisis counselor through our after-hours service called Protocol. Protocol has personal numbers for our support team and is instructed to call someone from your support team if the need arises. If it is a routine call, you or your employee can leave a message and we will contact you the next business day.

### Supervisor Newsletter

The Village Business Institute's EAP creates and distributes newsletters to all supervisors on a quarterly basis in electronic or hard copy format. VBI does this to provide information and articles useful and interesting to your supervisors and organizational leaders. These newsletters cover topics to help create a better and more effective work environment, and to help to resolve challenges to productivity and wellness.

### Communication Materials/Educational Materials

Our philosophy is to promote our EAP with hands-on employee communication as we feel it is vital to the success of your benefit. We offer a variety of

promotional/educational materials which are intended to inform your employees of the services available under their EAP. Our communication program is comprised of printed items, electronic documents, and web materials.

For your convenience, we've developed an orientation packet to introduce the EAP to your company and your employees. To obtain additional orientation packets, please contact your account executive. The orientation packet includes the following items:

**For Employees/Supervisors:**

- An electronic welcome email and PDF describing the EAP
- Pre-announcement letter to employees at the work site
- Company welcome letter to introduce EAP to new employees
- EAP employee brochure which provides an explanation of benefits
- EAP wallet card with contact information
- Sample supervisor and employee newsletters

The following promotional/educational materials are available for your use and will be sent to you prior to your contract effective date (with more available as needed):

- **Wallet Card**—Our blue card which provides contact information is designed to put in a wallet or on display.
- **EAP Employee Brochure**—This brochure outlines the EAP services available to employees and their families. It includes clear instructions for accessing the program.
- **EAP Posters**—VBI develops a yearly poster campaign to remind employees of their EAP benefit. Display your EAP posters in high-traffic areas, throughout your company, including the break room, lounge and hallways. It's an excellent reminder to your employees that they have an EAP available 24/7.
- **EAP Check Stuffers**—These raise awareness of the EAP benefit and are meant to insert in paycheck envelopes or to send to your employees electronically. The EAP check stuffers raise awareness of the EAP benefit. The purpose of the check stuffers is to periodically remind your employees of the availability of EAP services and the type of services offered.
- **Supervisor's Guide to the EAP**—The Supervisor's Guide, provided in hard copy or electronic format, is an essential tool used to assist your supervisors in identifying and dealing with declining performance and other job-related issues.
- **Orientation DVD's**—these are provided for the employer to show supervisor and employee orientation videos.

**To order materials:**

Call or email your account executive directly or, call 1-800-627-8220 to request promotional or educational materials needed.

## **Supervisor Orientation**

Sessions are conducted annually, or more frequently upon request, and a “Supervisors Guide” is given to each supervisor at the time of the orientation. Some of the topics discussed in supervisor orientation sessions include our toll free Supervisor/Human Resource HelpLine, formal and informal referral procedures, constructive confrontation, and substance abuse issues. The Village Business Institute offers three ways for a supervisor to get familiar with the EAP benefit.

- Face-to-orientation. Call your account executive to schedule a face-to-face orientation.
- Orientation DVD. Provided to you at signing. Call your account executive for additional DVD’s.
- Online. The orientation and supervisors guide can also be accessed on our website at [www.villageeap.com](http://www.villageeap.com) under Employer Resources, Introduction and Supervisor Orientation. Other introduction information is available here as well.

## **Supervisor/Human Resource Helpline**

Supervisors often find themselves facing unfamiliar challenges in their roles as managers and work group leaders. The Village EAP Supervisor Helpline is available to member companies for consultation on situations a supervisor, manager, or HR representative may encounter in the workplace.

The Village Business Institute’s EAP Supervisor/Human Resource Helpline is staffed by trained professionals available for consultation on a variety of human resource and workplace issues. Simply call our toll free number at 1-800-627-8220 and ask for the Supervisor/Human Resource Helpline. You can discuss your situation, problem-solve, develop possible solutions, and ask questions.

For after-hours assistance, call the same 1-800-627-8220 number. Once you reach the available crisis counselor, simply ask for the EAP professional on call to be made aware of the situation for which you called. The crisis counselor will then contact the EAP professional on call to relay the information and they will contact you to determine services needed.

## **Supervisor Referrals for Job Performance, Drug-Free Workplace, or DOT violations**

The EAP is a significant support tool for supervisors who have employees with performance issues. As a first step, call the EAP access number to consult with a case manager (our clinical associate or client services supervisor). The case manager can provide telephonic advice and support. In some cases, further steps may be necessary and a referral is warranted. We provide two types of EAP Supervisor Referrals:

- **Informal Referrals** are used when an employee approaches you with a personal problem and/or you are aware the employee is going through a difficult time, however there are no current job performance issues.

- **Formal Supervisor Referrals** are useful when you have documented a job performance decline over a period of time, and despite your efforts, the employee has not been able to turn around his or her performance. Formal referrals are also appropriate when an employee violates your Drug-Free Workplace policy or the Department of Transportation rules and regulations.

Once a formal referral has been opened and we have received the employee's signature of consent, you will be provided with information regarding:

- Whether or not the employee scheduled and attended EAP appointments (not just the first appointment).
- If the employee is compliant with any recommendations resulting from the EAP assessment or the chemical dependency evaluation.
- When the employee is nearing the completion of their goals. We consider both the counselor's and the employer's feedback in determining if the client has successfully completed their goals and the formal referral is ready to be closed.

### Supervisor Referral Protocol

A supervisor referral process typically occurs in the following way:

- A company supervisor (or designated company contact) calls the EAP access number and states either; they want to make a supervisor referral, they have identified a job performance problem, or a Drug-Free Workplace (DFWP) violation has occurred.
- The designated case manager provides consultation services, gathers data on the situation, and reviews the formal referral process with the supervisor.
- The case manager will coordinate with the referring supervisor to obtain the signed Formal Referral forms. (By signing the Formal Referral forms, the employee gives EAP permission to release information to their employer. Therefore, it is necessary that the employee signature be included in order for the formal referral process to move forward.) Upon receipt of the signed forms, the case is opened.
- The company supervisor reviews the job performance issues or DFWP violation with the employee, and instructs the employee to call EAP intake staff to access services.
- Upon receipt of the signed Formal Referral paperwork, the employee has one week in which to call and schedule an appointment. If there has been no contact within that time, the case manager will notify the supervisor that the employee is in non-compliant status. The employee will be given one more week in which to schedule an appointment. If the employee fails to do so, the case will be closed as non-compliant and the supervisor will be notified in writing.
- When the employee contacts the EAP as requested by the supervisor, an intake staff member conducts an intake with the employee, schedules an appointment with a counselor, and provides the counselor with the pertinent documentation. (Subsequent appointments are scheduled directly by the employee with the counselor).
- Upon notification of this appointment, the EAP case manager contacts the counselor and reviews the supervisor referral process.

- The counselor conducts a face-to-face assessment to evaluate the employee's job performance issues, DFWP issues, and/or the personal problems affecting them.
- The counselor regularly updates the case manager throughout the EAP assessment process and reviews the data. (The counselor reviews with the case manager after each EAP session, not just at the completion of the assessment.)
- The counselor gives the employee an action plan or makes recommendations either face-to-face or through a telephonic conversation.
- The case manager regularly updates the company supervisor of the employee's attendance, cooperation, pertinent recommendations, and progress.
- The case manager continues to provide consultation to the supervisor as long as needed to ensure job performance resolution.
- The counselor contacts the case manager when they think the employee has met the performance goals and they are ready to close the formal referral. The case manager contacts the supervisor for input as to whether or not they see performance improvement.
- The supervisor referral case is closed when the supervisor indicates that no further consultation is needed.
- In regard to DFWP referrals, the counselor develops appropriate recommendations based on the chemical dependency evaluation. The recommendations are shared with the case manager and the employee. The counselor will coordinate substance abuse referrals based on employee's benefit options.
- Upon receipt of the recommendations, the case manager notifies the supervisor of the results, and regularly updates them on the employee's progress in following through on the recommendations. When the employee successfully completes the recommendations, the case manager notifies the supervisor and closes the case.

### **Customized Employee and Management Training**

The Village Business Institute offers a multitude of trainings for both managers and employees. Through your EAP benefit, you have access to these training hours either through your contract or as a purchasable option (see matrix on p. 3). Your account executive will go over this with you when you sign the contract.

Once you've decided to access the customized employee and management training, the VBI Team will work with and assist you in developing a customized program to maximize the benefit of your training to meet the unique needs of your organization. To schedule training, please contact our client services supervisor at 1-800-627-8220, [vbitraining@thevillagefamily.org](mailto:vbitraining@thevillagefamily.org), or through the "contact us" link on our website [www.villageeap.com](http://www.villageeap.com).

Options for your training delivery include:

- In-person presentation: We schedule a time at the site of your choosing for the training to take place with the presenter on-site.

- E-learning: You can choose one of our pre-established trainings, or have one developed for you, on our web-based learning program. One hour of contract training equates to one hour of e-learning for fifty people.
- WebEx: Using either your system or ours, the presenter delivers a live presentation from a remote location.

**Recording policy:** We do not allow the WebEx and in-person presentations to be recorded unless a contract is established ahead of the presentation date.

**Cancellation policy:** Please provide at least five full consecutive business days advance notice when cancelling on-site services (or changing dates/times).

### **Crisis Management Services**

Crisis can come in many forms, including accidental death, worksite injury, natural disasters, terrorism and crime. Organizations can enhance their ability to survive crisis and stay in business by implementing a comprehensive crisis management plan. The Village Business Institute's team of Crisis Management Planning and Response professionals will assist you in limiting the negative impacts of a crisis.

### **Planning for Crisis**

Prior to a crisis, VBI consultants will assist in establishing crisis procedures within a well-coordinated crisis response plan. VBI offers a range of crisis services, including:

- Risk assessment.
- Preparation of crisis management plans including policies, manuals and checklists.
- Development and training of on-site crisis management teams.
- Consultation on the management of crisis communications.

### **Adverse Incidents, Grief, and Stress in the Workplace**

Difficult or adverse incidents in the workplace impact employees and their performance. Even events and accidents that occur outside the workplace can negatively influence performance and morale when employees are affected by those events.

Employers can respond to these incidents by providing their employees with timely support by The Village Business Institute. Village counselors and affiliates are experienced in responding to adverse incidents that can have a very human impact upon an organization's employees. Counselors are available to provide employees (and management) with on-site opportunities to process their experience and learn to recognize their own stress or grief response. Prompt intervention and information regarding stress response, stress management, and grief can help reduce negative impacts and preserve employee engagement.

### **Trauma: Accidents, Life Threatening Injuries, and Death in the Workplace**

Work-related traumatic incidents directly impact the physical safety and emotional well-being of employees. Trauma in the workplace is not only a threat to organizational productivity, but it can also negatively impact employee perceptions of their own relationship with the organization.

The Village Business Institute offers intervention for workplace trauma by utilizing a defined model of trauma response known as Critical Incident Stress Management (CISM). The CISM model offers specific individual, group, and organizational interventions designed to provide timely assessment, information, and support during crucial moments in the life of an organization. Counselors trained in CISM intervention are able to facilitate a process for the group or individual intended to reduce the impacts of trauma and stress upon employees and management within the organization.

### **Crisis Management Briefing**

A crisis management briefing is an intervention effective in the wake of community-wide or organizational crisis. The goal of a briefing is to provide information about the nature of the crisis and the organizational response; present information about common reactions to crises; and promote personal coping and self-care strategies that may mitigate stress reactions. A briefing is an efficient large-group crisis intervention, and may be delivered any time following a crisis.

### **Utilization and Outcomes Reports**

Our utilization reports are helpful in identifying issues of concern to your employees and their household members that may affect their performance and productivity at work. It is offered in a meaningful, easy-to-read format and includes specific information about your organization. Your reports are available bi-annually or upon request from our client services supervisor.

The Village Business Institute’s utilization reporting defines the number of people seen, the assessed problem determined by the counselor, and the number of referrals made. In order to offer you actual service reporting, utilization reports do not include the number of inquiry calls from employees, number of canceled/no show appointments, or the number of website hits. This allows for a more accurate utilization based on “actual services received.”

We offer a full array of reports including:

- **Utilization Summary**
- **Demographics**
- **Referred By**
- **Presentation Profile**
- **Supervisor Referral Report**
- **Supervisor Referral Report for Workplace Consult Issues**
- **Auxiliary Service**
- **EAP Client Usage by Month**

Examples of these reports are on the pages to follow:

**Utilization Summary Report**

This report identifies how many participants access service through your EAP, the percentage of your organization workforce that it represents, and the total number of service contracts we've had with your employees.

<p><b>EAP Management Report</b></p> <p>For ABC Company</p> <p>For the period: Sunday, January 01, 2012 - Monday, December 31, 2012</p>
--

**UTILIZATION SUMMARY**

Client Case Activity Summary

Total new and re-opened cases during period	85
New cases	85
Re-opened cases	0
Annualized utilization rate for new and re-opened cases	10.26%
Pre-existing cases seen during period	11
Total new, re-opened and pre-existing cases	96
Employee cases	77
Non-Employee cases	19
Annualized utilization rate for all cases	11.58%

Annualized utilization rate is calculated based on a population of 827 employees and 366 days in this reporting period.

Number of cases above closed during period	40
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Client Contact Summary

Total number of contacts with the clients	258
Average number of contacts per Client Case	2.69

Client Referral Summary

Number of Referrals for Cases Selected	0
Average number of referrals per Client Case	0

Workplace Consultation Summary

Number of workplace consults opened	11
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Auxiliary Services Summary

Number of auxiliary services conducted	14
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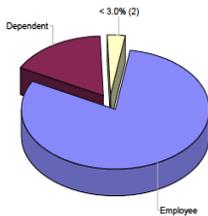
### Demographics

These reports indicate the member type (employee, spouse or dependent), marital status and age of participants.

**EAP Management Report**  
 For  
 ABC Company  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Who is the Client**

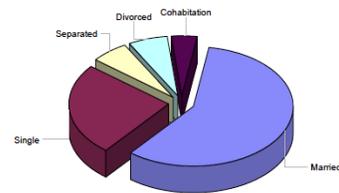
Title	Count	Percentage
Employee	77	80.2
Dependent	16	16.7
Spouse	2	2.1
Other	1	1.0
	<u>96</u>	



**EAP Management Report**  
 For  
 ABC Company  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Marital Status**

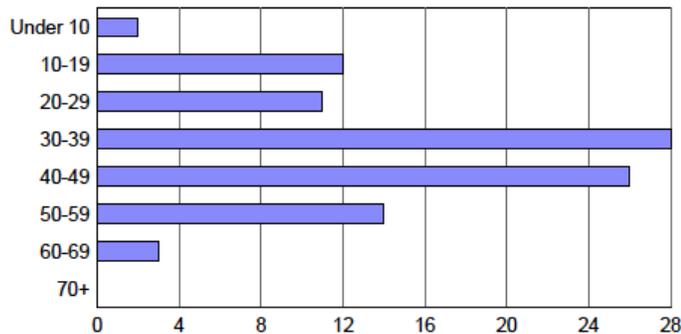
Title	Count	Percentage
Married	56	58.3
Single	24	25.0
Separated	6	6.3
Divorced	6	6.3
Cohabitation	4	4.2
	<u>96</u>	



**EAP Management Report**  
 For  
 ABC Company  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Age Groupings**

Title	Count	Percentage
Under 10	2	2.1
10-19	12	12.5
20-29	11	11.5
30-39	28	29.2
40-49	26	27.1
50-59	14	14.6
60-69	3	3.1
70+	0	0.0
	<u>96</u>	



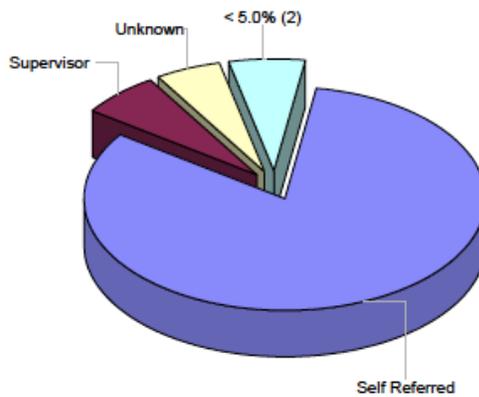
**Referred By Report**

This report indicates who referred the individual to the EAP (Self-Referral, Unknown or Supervisor Referral). In the case of “unknown” this usually means the participant was unwilling to share this information.

**EAP Management Report**  
 For  
**ABC Company**  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Referred By**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>
Self Referred	79	82.3
Supervisor	6	6.3
Unknown	5	5.2
Other Source	4	4.2
Other Coworker	2	2.1
	96	



**Presentation Profile Reports**

This report indicates the number of people presenting in each problem category. "Assessed Problem" indicates the problem as defined by the counselor after the initial session has taken place.

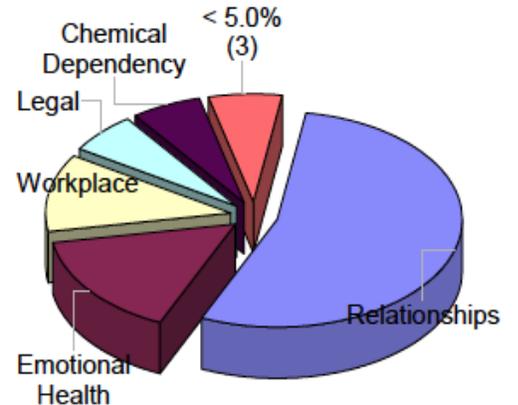
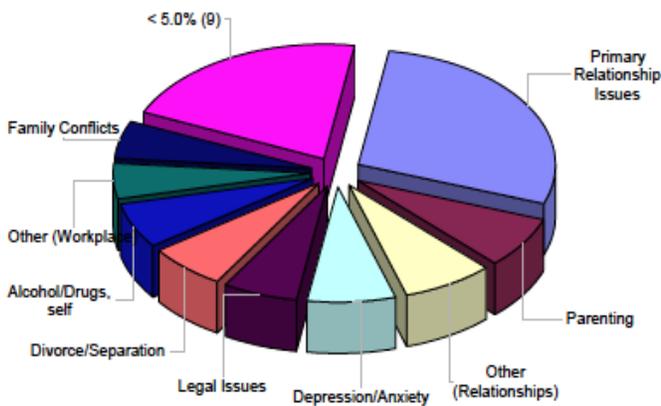
**EAP Management Report**  
 For  
**ABC Company**  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Primary Assessed Problem**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>
Primary Relationship Issues	27	28.1
Parenting	7	7.3
Other (Relationships)	7	7.3
Depression/Anxiety	7	7.3
Legal Issues	6	6.3
Divorce/Separation	6	6.3
Alcohol/Drugs, self	6	6.3
Other (Workplace)	5	5.2
Family Conflicts	5	5.2
Self-concept/esteem	4	4.2
Job Stress	3	3.1
Grief/Major Loss	3	3.1
Financial Issues	3	3.1
Employee/Supervisor Conflict	2	2.1
Truancy/Behavior Problems	2	2.1
Medical/Physical Issues	1	1.0
Co-worker Issues	1	1.0
Anger	1	1.0
<hr/> <hr/>		96

**Problem Group**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>
Relationships	52	54.2
Emotional Health	15	15.6
Workplace	11	11.5
Legal	6	6.3
Chemical Dependency	6	6.3
Financial	3	3.1
Educational	2	2.1
Physical Health	1	1.0
<hr/> <hr/>		96

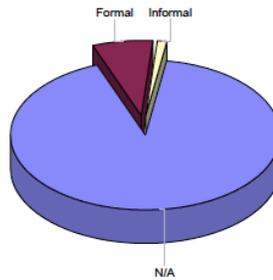


**Supervisor Referral Report**

**EAP Management Report**  
 For  
 ABC Company  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Supervisor Referral**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>
N/A	88	91.7
Formal	7	7.3
Informal	1	1.0
	96	



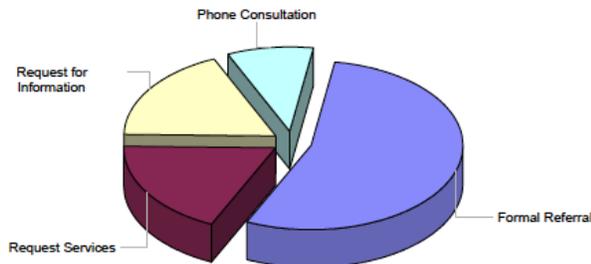
**Supervisor Referral Report for Workplace Consult Issues**

This report details how many clients were formal referrals for workplace issues. Workplace issues include job performance issues, Drug-Free Workplace violations and DOT violations.

**EAP Management Report**  
 For  
 ABC Company  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Workplace Consult Issue**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>
Formal Referral	6	54.5
Request Services	2	18.2
Request for Information	2	18.2
Phone Consultation	1	9.1
	11	



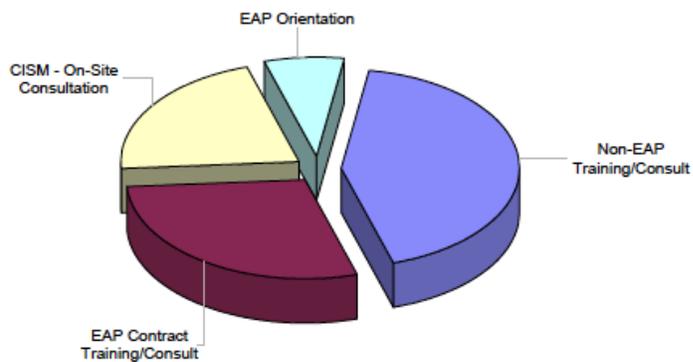
**Auxiliary Service Report**

This report indicates the number of auxiliary services utilized during this period. Auxiliary service includes EAP orientations, information packets received, training hours used, and crisis services accessed.

**EAP Management Report**  
 For  
**ABC Company**  
 For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

**Auxiliary Service Type**

<u>Title</u>	<u>Count</u>	<u>Percentage</u>	<u>Hours</u>	<u># Atnd</u>
Non-EAP Training/Consult	6	42.9	10.00	45
EAP Contract Training/Consult	4	28.6	6.00	58
CISM - On-Site Consultation	3	21.4	7.00	14
EAP Orientation	1	7.1	1.00	100
	<u>14</u>		<u>24.00</u>	<u>217</u>



### EAP Client Usage by Month Report

This report details the monthly usage by new and re-opened cases, pre-existing cases seen, and client contacts.

## EAP Management Report

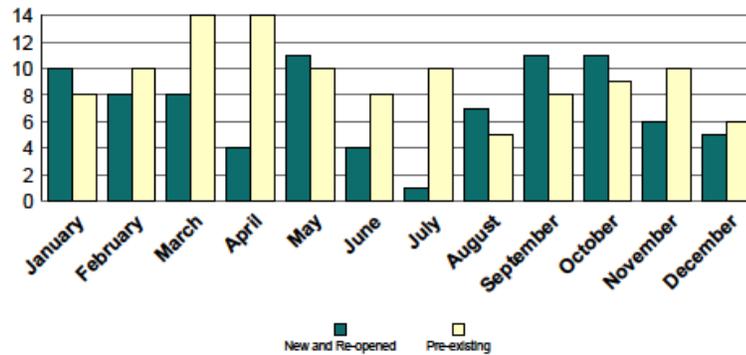
For  
ABC Company

For the period: Sunday, January 01, 2012 - Monday, December 31, 2012

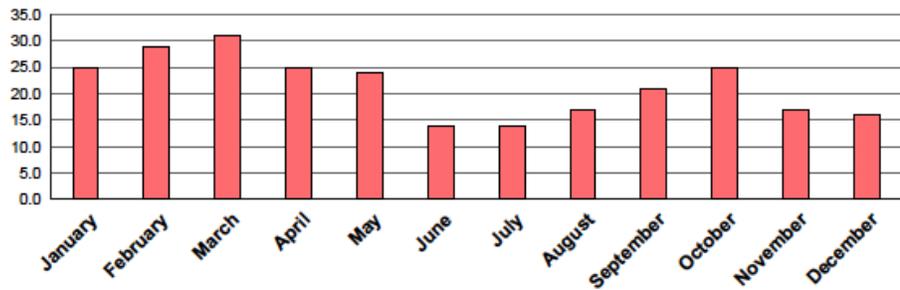
#### EAP Client Usage by Month

<u>Month</u>	<u>New and Re-opened Cases</u>	<u>Pre-existing Cases Seen</u>	<u>Client Contacts</u>
January	10	8	25
February	8	10	29
March	8	14	31
April	4	14	25
May	11	10	24
June	4	8	14
July	1	10	14
August	7	5	17
September	11	8	21
October	11	9	25
November	6	10	17
December	5	6	16

**Client Cases**



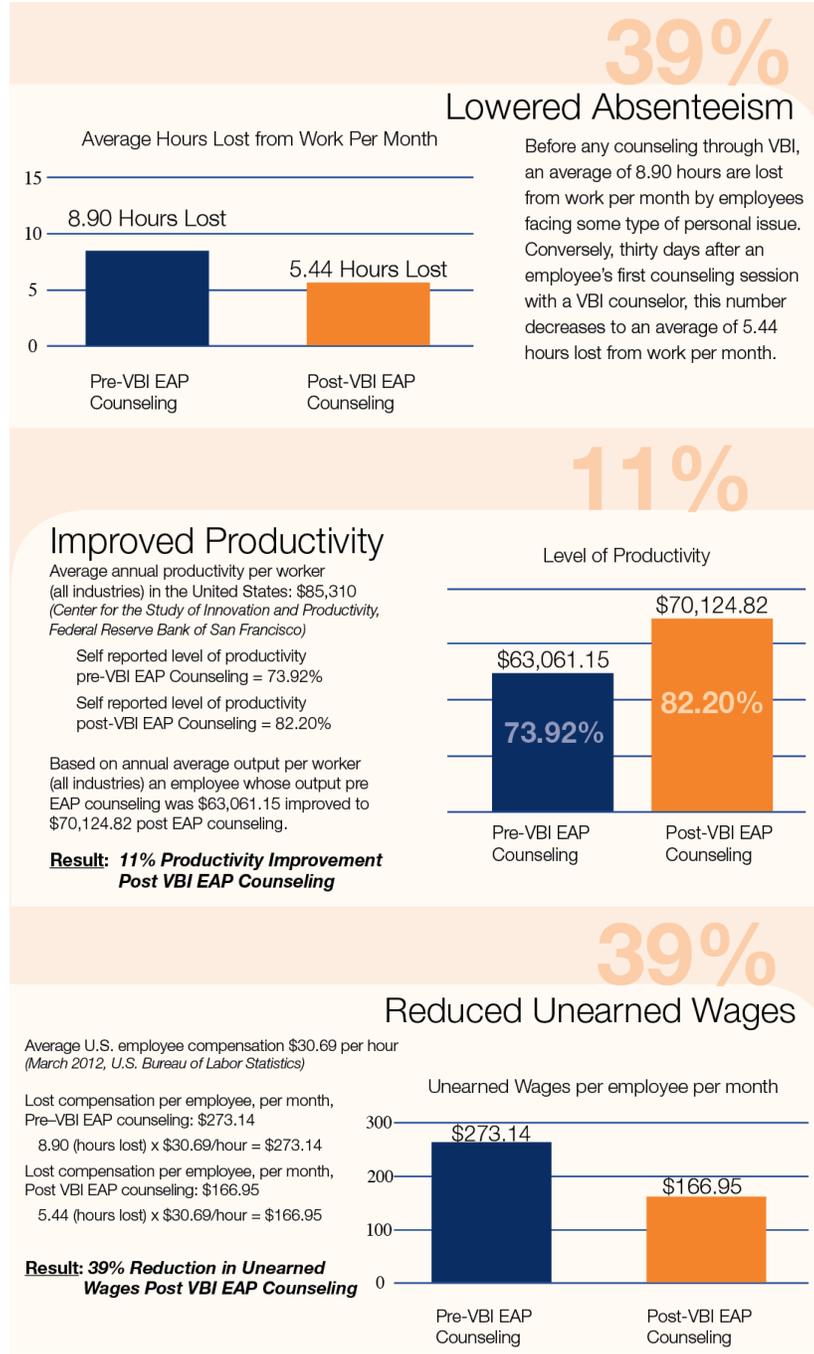
**Client Contacts**



**Outcomes Data**

Part of the mission of The Village Business Institute is continuous improvement of the services we offer. Studies show employee assistance programs decrease absenteeism, improve productivity, reduce unearned wages, and improve health. One of the ways we track this is through our outcomes data collection and reporting.

Below is a copy of our Return on Investment (ROI) report for companies using The Village Business Institute’s EAP services. If you would like a hard copy of this data or would like to discuss it in more detail, please contact your account executive or our client services supervisor.



21%

## Partial Work Days

EAP counseling has been shown to reduce the incidence of partial work days of employees by 21 percent, which in turn results in an improvement of earned wages by the same amount.

## Health = Wealth

### Health Rating

Healthier employees are more productive employees.

“Poor health among workers is far costlier to U.S. employers than they realize, impacting their profitability and undercutting the nation’s overall productivity. A recent multi-employer study published in the Journal of Occupational and Environmental Medicine indicates that the costs of poor health are much greater for employers than medical and pharmaceutical spending alone.”

—Dan Leonard, President, National Pharmaceutical Council

26%

**26.35% reported general improvement in health post EAP counseling.**

**Estimated average total health care costs per employee \$11,664 (Towers Watson, 2012)**

98%

## Perceived Value

98 percent of employees who accessed The Village Business Institute’s EAP, reported that the EAP was a valuable benefit.

## Additional Services for Purchase

### Consulting Services

- **Coaching: Executive, Management, Leadership, Career, and Peer**  
Coaching is the process of bringing the best out in yourself or your employees. VBI provides high quality coaching services through a professional staff dedicated to assisting working people in leading healthy, productive lives.
- **Career Transition Services**  
Many companies, faced with the need to eliminate positions due to organizational restructuring or cost-saving measures, have found it very beneficial to provide career transition services.
- **Employee Engagement Surveys**  
Employee engagement is comprised of two related but distinct factors: Employee satisfaction and employee commitment, and can be further defined as "...the state of intellectual and emotional involvement employees have in an organization. It is the extent to which employees want to, and actually do, improve business results. You might call it a measure of energy or passion, or think of it as a measure of the extent of which you have captured the hearts and minds of your people." (Hewitt Associates – Best Companies to Work for in Canada)
- **Human Resource Consulting**  
VBI can assist your Human Resource department or personnel with the following services:
  - **Hiring**
  - **Policy and Handbook Development**
  - **Investigations**
  - **Salary surveys**
- **Individual Assessment**  
VBI customizes outplacement services for your senior professionals, managers and executives.
  - **Group Assessment**
  - **Leadership Transition Services**
- **Organization Development**  
VBI's Organization Development Consultants assess organizational strengths and opportunities. Methodologies include interviews, surveys, situational analysis, testing, focus groups, and review of policies and procedures. Following the assessment, we will present you with a comprehensive report of the results, including observations and recommendations. Based on the results of the organization development assessment, we can offer additional services that can help you.
- **Strategic Planning**  
Effective strategic planning and implementation requires a continuing commitment by everyone in the organization. To be effective, strategic planning must be a process of constant vigilance and assessment of customer and stakeholder needs congruent with the organization's mission and culture. VBI's

Organization Development Consultants can assist your organization in developing an effective, practical, and results-oriented Strategic Plan.

- **Transportation Industry Consulting**

VBI can assist companies in the transportation industry with a variety of services. We recognize that the transportation industry has unique needs, particularly in complying with the federal regulations regarding drug and alcohol testing. No matter where your employees are in the United States, we can help.

- **Workplace Mediation**

Conflict is an unavoidable reality. It is part of our daily lives on many different levels. In and of itself, it is not necessarily a bad thing, but when conflict between people in the workplace becomes unmanageable, it is time to take steps to remove the impasse. VBI's Qualified Neutral Mediators can help resolve workplace conflicts that negatively affect employee productivity and save your organization time, expense, and possible litigation.

### **Executive Level Services**

The leaders and managers of your business—whether they are doctors, engineers, vice presidents or CEO's—often face unique challenges in their roles. How leaders face those challenges can have a profound impact on the financial performance and public image of your business. The Village Business Institute's highly qualified consultants and trainers know how to help leaders to be their best in building positive, high performance, work cultures.

### **Leadership Transition Facilitation**

New managers or leaders generally take approximately six months to become fully effective in their new positions. Systems, processes, programs, resources, and other personnel are all affected during times of transition, which equates to a loss of productivity, at the very least. The Leadership Transition Process is a facilitated process designed and proven to be effective in a department or organization's leadership transition. That means there is less turmoil, less chaos, and higher levels of productivity, all of which go straight to "the bottom line."

### **Executive Coaching**

Executive Coaching will help you build a more effective and profitable organization. The Village Business Institute will complete a comprehensive assessment of your leadership strengths and challenges, help you remove obstacles to reaching your full potential, and expand your insight on making the most of power and personality dynamics. We will also find new ways to help you deal with the people-related issues that can arise in a growing organization.

## Payment Procedures

VBI will send you an invoice monthly, quarterly, semi-annually, or annually, depending on your contract size and your preference. Just before your current contract year expiration date, your account executive will contact you to discuss your EAP services and to gather updated FTE or employee counts for the upcoming contract year. Please respond with current numbers as soon as possible so EAP services will not be disrupted.

## Invoice

THE VILLAGE FAMILY SERVICE CENTER  
 P.O. BOX 9859  
 FARGO, ND 58106-9859  
 PH. 701-451-4900

*ABC Company*  
*Attn: Accts Payables*  
*123 Candy Lane*  
*Candy Lane, ND 12345*

ACCT NUMBER	DATE
0000123	1/1/2013
<input type="checkbox"/> Discover <input type="checkbox"/> Mastercard <input type="checkbox"/> Visa <input type="checkbox"/> Amer. Exp.	
Card Number	
Expiration Date	Signature Code
Signature	
Amount Paid	\$

Credit Limit: No Limit  
 Normal Terms: Net 30 Days  
 Fin. Chg. APR: 0.00%

PLEASE DETACH AND RETURN THIS PORTION WITH YOUR PAYMENT.

REFERENCE	DATE	CODE	DESCRIPTION	AMOUNT	BALANCE
Invoice #	01/01/13	SLS	EAP Contract for XXXXXX	XXXX	XXXX
			Please Remit to:  The Village Family Service Center PO Box 9859 Fargo, ND 58106		
				AMOUNT DUE	XXXX

CODES: C = CR MEMO    P = PAYMENT    A = DISCOUNT ALLOWED    F = FINANCE CHARGE    S = SERVICE REPAIR  
 D = DR MEMO    I = INVOICE    B = BALANCE    W = WARRANTY    C/R = CASH REFUND

CURRENT	31 DAYS OLD	61 DAYS OLD	91 DAYS OLD -
XXXX			

## **Accreditation and Compliance**

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The EAP services offered by The Village Business Institute [VBI] are accredited by the Council on Accreditation [COA] and meet the highest standards of confidentiality and quality of services. In addition we comply with and meet all state and federal standards applicable to the delivery of EAP services. If you have legal questions about implementing a benefits program within your organization, we recommend you consult with your own legal counsel. They may contact us with any questions they have regarding the benefits programs offered by VBI.

### **EAP Contract**

A fully completed contract for EAP services will be provided to you prior to the effective date of the EAP in your organization. Your designated account executive will work with you on completing start-up arrangements including provision of promotional materials, employee and supervisor benefits orientations, benefits packets, welcome letters, mailing/e-mailing lists, and other arrangements as agreed to.

### **Business Associate Agreement**

VBI is generally considered a Business Associate to our customers who are Covered Entities and we will provide a Business Associate Agreement upon request.

### **Summary of Benefits**

A Summary of Benefits is standardly provided with each new contract.