

THIS FORM MUST BE INCLUDED WITH RFP PACKAGE; PLEASE CHECK OFF EACH ITEM INCLUDED WITH RFP PACKAGE AND SIGN BELOW TO COMPLETE SUBMITTAL OF EACH REQUIRED ITEM.

“Employee Assistance Program Service Agreement”

- ☒ References Form
- ☒ Price Sheet
- ☒ Conflict of Interest Form (CIQ)
- ☒ Certification regarding Debarment (Form H2048)
- ☒ Certification regarding Federal lobbying (Form 2049)
- ☒ Purchasing Code of Ethics Affidavit
- ☒ House Bill 89 Form
- ☒ Senate Bill 252 Form
- ☒ Proof of No Delinquent Tax Owed to Webb County

Alicia Barrera, Vice President

Authorized Offeror's Printed Name and Title

Alicia Barrera

Authorized Offeror's Signature

9/12/2024

Date

Form A - Bid Price Sheet

Monthly Per Employee Per Month (PEPM) rate proposed - 6-SESSION COUNSELING MODEL				
Item No.	Unit Type	Term	Item Description	Unit Cost PEPM
1	PEPM	Base Year 10/1/2024 - 09/30/2025	Per Employee Per Month rate or reimbursement per employee	\$1.43
2	PEPM	Option to Extend ending 09/30/2026	Per Employee Per Month rate or reimbursement per employee	\$1.43
3	PEPM	Option to Extend ending 09/30/2027	Per Employee Per Month rate or reimbursement per employee	\$1.43
4	PEPM	Option to Extend ending 09/30/2028	Per Employee Per Month rate or reimbursement per employee	\$1.47
5	PEPM	Option to Extend ending 09/30/2029	Per Employee Per Month rate or reimbursement per employee	\$1.51
			List any and all Optional Add On Services & rates (indicate if its PEPM rate and/or per hourly rates)	
			Onsite Orientation*	\$300.00/hour
			Webinar Orientation*	\$150.00/hour
			Training Catalog Seminars*	\$300.00/hour
			Webinar Catalog Seminars*	\$150.00/hour
			2-hour Critical Incident Support Events*	\$600.00/2-hour event; \$300.00/additional hour
			Health Fair/Event Attendance*	\$150.00/hour
			Virtual Group Coaching Session*	\$ 300.00/hour
			Department of Transportation (DOT) Substance Abuse Professional (SAP) Evaluation & Mandatory Substance Abuse Cases	\$ 950.00/evaluation
			LiveWell Telephonic Wellness Coaching	\$ 0.46 PEPM
				* Beyond the allotted hours included within the 18-hour annual in-service bank
Note: Webb County currently has a total of 1,547 Full time active employees				

Deer Oaks EAP Services, LLC

Company Name

Alicia Barrera, Vice President

Signature of Authorized Representative

9/16/2024

Date

Form A - Bid Price Sheet

Monthly Per Employee Per Month (PEPM) rate proposed - 8-SESSION COUNSELING MODEL				
Item No.	Unit Type	Term	Item Description	Unit Cost PEPM
1	PEPM	Base Year 10/1/2024 - 09/30/2025	Per Employee Per Month rate or reimbursement per employee	\$1.69
2	PEPM	Option to Extend ending 09/30/2026	Per Employee Per Month rate or reimbursement per employee	\$1.69
3	PEPM	Option to Extend ending 09/30/2027	Per Employee Per Month rate or reimbursement per employee	\$1.69
4	PEPM	Option to Extend ending 09/30/2028	Per Employee Per Month rate or reimbursement per employee	\$1.74
5	PEPM	Option to Extend ending 09/30/2029	Per Employee Per Month rate or reimbursement per employee	\$1.79
			List any and all Optional Add On Services & rates (indicate if its PEPM rate and/or per hourly rates)	
			Onsite Orientation*	\$300.00/hour
			Webinar Orientation*	\$150.00/hour
			Training Catalog Seminars*	\$300.00/hour
			Webinar Catalog Seminars*	\$150.00/hour
			2-hour Critical Incident Support Events*	\$600.00/2-hour event; \$300.00/additional hour
			Health Fair/Event Attendance*	\$150.00/hour
			Virtual Group Coaching Session*	\$ 300.00/hour
			Department of Transportation (DOT) Substance Abuse Professional (SAP) Evaluation & Mandatory Substance Abuse Cases	\$ 950.00/evaluation
			LiveWell Telephonic Wellness Coaching	\$ 0.46 PEPM
				* Beyond the allotted hours included within the 18-hour annual in-service bank
Note: Webb County currently has a total of 1,547 Full time active employees				

Deer Oaks EAP Services, LLC

Company Name

Alicia Barrera, Vice President

Signature of Authorized Representative

9/16/2024

Date

Form A - Bid Price Sheet

Monthly Per Employee Per Month (PEPM) rate proposed - 12-SESSION COUNSELING MODEL				
Item No.	Unit Type	Term	Item Description	Unit Cost PEPM
1	PEPM	Base Year 10/1/2024 - 09/30/2025	Per Employee Per Month rate or reimbursement per employee	\$2.02
2	PEPM	Option to Extend ending 09/30/2026	Per Employee Per Month rate or reimbursement per employee	\$2.02
3	PEPM	Option to Extend ending 09/30/2027	Per Employee Per Month rate or reimbursement per employee	\$2.02
4	PEPM	Option to Extend ending 09/30/2028	Per Employee Per Month rate or reimbursement per employee	\$2.08
5	PEPM	Option to Extend ending 09/30/2029	Per Employee Per Month rate or reimbursement per employee	\$2.14
			List any and all Optional Add On Services & rates (indicate if its PEPM rate and/or per hourly rates)	
			Onsite Orientation*	\$300.00/hour
			Webinar Orientation*	\$150.00/hour
			Training Catalog Seminars*	\$300.00/hour
			Webinar Catalog Seminars*	\$150.00/hour
			2-hour Critical Incident Support Events*	\$600.00/2-hour event; \$300.00/additional hour
			Health Fair/Event Attendance*	\$150.00/hour
			Virtual Group Coaching Session*	\$ 300.00/hour
			Department of Transportation (DOT) Substance Abuse Professional (SAP) Evaluation & Mandatory Substance Abuse Cases	\$ 950.00/evaluation
			LiveWell Telephonic Wellness Coaching	\$ 0.46 PEPM
				* Beyond the allotted hours included within the 18-hour annual in-service bank
Note: Webb County currently has a total of 1,547 Full time active employees				

Deer Oaks EAP Services, LLC

Company Name

Alicia Barrera, Vice President

Signature of Authorized Representative

9/16/2024

Date



DEER OAKS
EAP SERVICES
An EAP + Work-Life Provider



EAP + WORK-LIFE PROPOSAL

Webb County, Texas

RFP No. 2024-011 – Employee Assistance

Program Due: September 17, 2024 by 4:00 PM

Submitted by: Deer Oaks EAP Services



Greg Brannan, Dir. Business Development



7272 Wurzbach Rd., Ste. 601
San Antonio, Texas 78240



(301) 213-6149



gbrannan@deeroaks.com



7272 Wurzbach Ste. 601
San Antonio, Texas 78240

September 16, 2024

Mr. Juan Guerrero, Contract Administrator
Webb County Purchasing Department
1110 Washington St., Ste. 101
Laredo, Texas 78040

Re: RFP 2024-011 - Employee Assistance Program for Webb County

Dear Mr. Guerrero,

It is with pleasure that Deer Oaks EAP Services (Deer Oaks) submits this official response to Webb County's (County) above-mentioned RFP. We appreciate the opportunity to respond and guarantee the scope of services and rates quoted herein, as well as the financial stability and clinical and technical resources pertinent to the implementation, administration, and evaluation of the requested services.

Deer Oaks understands that Webb County is seeking a qualified offeror to provide a holistic well-being benefit for its employees through an integrated **Civil Service EAP + Work-life Program**. Using our three (3) decades of experience serving public employers including other municipalities, counties, and Texas employers and our last six (6) years of experience directly serving as the County's EAP partner, we have tailored an integrated **Civil Service EAP + Work-Life solution** that we believe will best continue to support the County and its employees moving forward.

Throughout our proposal, we have worked to demonstrate how Deer Oaks offers the most effective combination of integrated EAP, work-life, and organizational development services for the County. Our integrated, holistic approach and client and employee-centric programming combined with aggressive program promotion and robust training program will proactively assist members with both mental health and day-to-day issues, resulting in improved overall workforce productivity, well-being, engagement, and retention.

Through our established service capabilities and holistic suite of well-being services, we offer Webb County the full depth and breadth of Civil Service EAP + Work-life services that you require with an added level of high-touch customer support at a competitive rate. We excel in the EAP Core Technologies and offer clinically-sound, holistic support to achieve efficient and thorough resolution of issues. We are committed to continuing to build a strategic partnership with Webb County and to deliver a program that will serve your needs not just now, but well into the future.

This is reflected in our **3Rs commitment**:

Reach - Members can and will connect, comfortably.

Access to immediate care with qualified, empathetic professionals anytime, anywhere. We have expansive national and global networks of professionals ready to serve employees through our integrated phone systems and digital applications.



7272 Wurzbach Ste. 601
San Antonio, Texas 78240

Relevance – Solutions will matter, for everyone.

Our First Serve philosophy approach is about being a pathway and never an obstacle to support an employee in need. Through the “Power of a Good Conversation” we spend as much time as needed to get to the heart of a problem so that they get the right direction and can quickly engage with their best solution before their situation becomes unmanageable.

Results - You'll make a meaningful impact.

When an individual accesses our services, the results are positive. 98% of members feel we care about them and 97% feel our service helped them. Ultimately, wellbeing solutions are about making a positive difference in someone's life.

Through our holistic set of well-being services, Deer Oaks puts people first, so they can keep performing effectively. We provide holistic wellbeing solutions for the County so that you can continue to make a meaningful difference in your employees' lives – allowing them to more fully and effectively contribute to the County's mission.

Thank you for taking the time to review our proposal, which is structured in accordance with the provisions of the RFP. Deer Oaks appreciates the opportunity to once again compete for Webb County's business. Should you have any questions or require further information about our proposal, please do not hesitate to contact:

Mr. Greg Brannan
Director of Business Development & Training
7272 Wurzbach, Ste. 601, San Antonio, Texas 78240
Ph. (301) 213-6149 Email: gbrannan@deeroaks.com

Mr. Brannan is also authorized to bind Deer Oaks to the Contract, and should receive all official notices concerning this RFP.

The following representative is also authorized to make representations on behalf of Deer Oaks:

Alicia Barrera
Vice President
7272 Wurzbach, Ste. 601, San Antonio, Texas 78240
Ph. (210) 615-3415 Email: abarrera@deeroaks.com

Deer Oaks would be honored to continue to serve Webb County, its employees, and their dependents/household members.

Sincerely,

Alicia Barrera

Alicia Barrera
Vice President / Deer Oaks EAP Services, LLC



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Transmittal Letter

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Forms & Attachments (separately uploaded into the lonwave System)

- A. RFP Checklist Bid Form
- B. Bid Price Sheets – 6-session, 8-session, 12-session models
- C. References Form (Evaluation Criteria E)
- D. Conflict of Interest Questionnaire
- E. Certification regarding Debarment (Form H2048)
- F. Certification regarding Federal lobbying (Form 2049)
- G. Purchasing Code of Ethics Affidavit
- H. House Bill 89 Form
- I. Senate Bill 252 Form
- J. Proof of No Delinquent Tax Owed to Webb County
- K. 2024 Training Catalog
- L. 2024 Webinar Catalog
- M. Sample Standard Utilization Report
- N. Key Personnel Resumes (Evaluation Criteria D)



Section 1: Executive Summary

Deer Oaks EAP Services (Deer Oaks) is pleased to present our proposal for further supporting the delivery of integrated **Civil Service Employee Assistance Program (EAP) + Work-Life services** to Webb County (County).

As a **San Antonio, Texas-based national and global EAP** specializing in the administration of integrated EAP solutions for public sector employers for **32 years** and serving as **Webb County's EAP partner for the past six (6) years**, our EAP is specifically designed to continue to meet the needs of the County's employees, supervisors, managers, and first responders. We understand that as civil servants, your staff face unique challenges. We are here to support them- **proactively and holistically**.

It goes without saying that the past four years have been difficult for many people. The Covid-19 pandemic has, for better or worse, dramatically changed how organizations do business. Other issues such as continued inflation, supply chain issues, uptick of mass shootings, civil unrest, and other global events such as Russia's war in Ukraine and the Israel-Hamas War have caused stress, strain, and worry in organizations and households across America.

In fact, data from Gallup's new **State of the Global Workplace report** suggests that the emotional side of work has not yet healed from the pressures of the last three years, with **44% of employees** saying they experienced stress a lot during the previous day. Further, recent data from Willis Towers Watson found that nearly all employers recently surveyed by the consulting firm (86%) identify **stress** and **burnout** as a threat for their workforces and say it's a top HR priority.

Public sector employees haven't been immune to these challenges. **The Eagle Hill Consulting Workforce Burnout Survey found that government employee burnout levels were at 52% which is higher than the 46% burnout rate of employees working in private sector positions.** These issues along with retention/recruitment and stress continue to be key concerns for public sector employees.

Promoting modern wellbeing and preventative care helps to combat many of the difficulties organizations are facing today. "The Great Resignation," quiet quitting, high use of costly benefits, and disengaged workers are all situations that can be significantly improved when employees receive relevant wellbeing support through their **EAP + Work-Life Program** before their situation becomes unmanageable.

Helping people thrive goes beyond the programs we offer. We have an outstanding ecosystem of service capabilities that work together to give your employees the best care including, but not limited to:

- 24/7 unlimited access to in-the-moment support with credentialed providers and professionals
- Human-centric model, allowing for proper care navigation to the best support/modality within the program
- Anytime, anywhere modes of access including our member website
- Dynamic and globally integrated Unified Case Management System (UCMS) for high performance service delivery and reporting
- Continuously upgrading technology and global infrastructure for better user experiences – engineered to handle any crisis
- Expert consulting to help companies develop strategies to support a healthy workplace
- Pre-vetted, confirmed available referrals to fit members' needs



An engaging, highly effective integrated **EAP + Work-Life solution** such as the one offered by Deer Oaks can not only provide the necessary support to employees to navigate work and life challenges in the moment before they have a negative impact on their work productivity and personal well-being, but also help the County to **mitigate the impact of issues** such as **burnout**, **lowered engagement**, **stress**, and **high medical claims** within your workforce.

Our diverse programs, as detailed in our proposal, promote and help employees along with their dependents and household members to achieve a balance of emotional, social, environmental, and cultural well-being, which in turn positively affects workplace productivity, performance, and engagement, while minimizing turnover.

In fact, here are some recent outcomes/impact statistics from across our clientele:



91%

of all cases showed improvement in overall wellbeing, which can increase effectiveness



86%

of all cases showed improvement in interpersonal relationships, which can result in better collaboration



97.4%

respondents felt the service helped them feel better and improve



+37%

increase in ability to focus which can increase productivity



+35%

increase in ability to sleep well, which can lead to better personal performance



+37%

increase in ability to accept emotions which can result in better peer relations



We are dedicated to further supporting Webb County and its employees in these trying times through our **More than an EAP** approach. **Our approach is preventative—not reactionary.** We assist employees with working through a wide range of challenges from relationship issues, both personal and professional; stress; and anxiety to developing strategies to maintain better work-life balance; time management; and managing to-do lists. We offer proactive resources that provide employees with the right tools and confidential resources to combat stress and navigate work and life challenges.

Deer Oaks offers the County the following initiatives as part of our **“More than an EAP approach”**.



FAMILIARITY & TEXAS-BASED ACCOUNT MANAGEMENT

Having served as the County’s EAP since 2018, we as an organization as well as your Program Manager, Kristina Herrera, have inside knowledge of organizational and personnel challenges, and familiarity with policies, procedures, and EAP program design.

Further, as a local, San Antonio, Texas-based EAP, we have a unique understanding of the diverse social and cultural landscape of our State, as well as the unique challenges faced by Texas counties, municipalities, border communities, and other public employers. This intrinsic knowledge and our present business throughout Texas and with Webb County ensure that we already have the resources and affiliate provider network in place to continue to provide efficient, high-touch service delivery to members through this contract without the hassle of a cumbersome transition and implementation.

Kristina will be available for check-in calls, quarterly utilization review meetings, and an annual program review, as well as additional support as needed on a daily basis. She is readily available to consult with the County on issues and to discuss innovative strategies to best serve the County, individual departments, and employee groups, and to successfully drive employee engagement with the program. We have built a partnership with the County and seek to continue our collaboration.



SERVICE-LEVEL ENHANCEMENTS

The County’s current EAP model routes all calls during normal business hours to our work-life consultant team and includes unconfirmed work-life referral lists. As part of our ongoing service-level enhancements for our clients, we are moving the County to our clinical access model, which routes all clinical calls, regardless of the day or time, to our master’s level clinical team. Our clinical access model ensures a streamlined triage process and in-the-moment clinical assistance.

Additionally, rather than a simple list referral, all work-life referrals will be qualified and matched to the specific needs and requirements of the user—**100% of the time**. For example, is the agency within a reasonable distance of the member's work or home? Does the agency have availability meeting the member's requirements? Do the agency's fees meet the member's budget? Does the agency accept the specified form of payment? Through these service enhancements, Deer Oaks seeks to provide employees with the most responsive, holistic approach to their challenges.



ONE SIZE DOESN'T ALWAYS FIT ALL

Our flexibility is unique across the industry. We don't take a hardline corporate stance to customer service. *We seek to be your partner, not just a vendor.* As such, we are committed to offering tailored, customized solutions for our clients rather than "off the shelf" programming. Each of our client organizations is different and faces various challenges. There is not a "one-size-fits-all" solution. Your Program Manager will work with the County to learn about its culture and changing workplace climates in order to determine how to best provide support at every level moving forward. This involves building relationships not only at the administrative level, but also at the departmental levels so we can tailor design programs to meet specific challenges for the County's various employee groups including first responders.



SERVICES TAILORED TO FIRST RESPONDERS/PUBLIC SAFETY

Through our experience serving local government, as well as, the Federal Law Enforcement Training Centers (FLETC), we have developed a wealth of experience in working with first responders, law enforcement, fire, case workers, and other high-risk employee groups. As such, in order to adapt our approach to serve this population, we actively conduct specialized outreach and education for first responder/public safety personnel to encourage program utilization; tailor critical incident response; develop custom webinar/on-demand training series on relevant topics including self-care, compassion fatigue, stress management, etc.; and meet with HR and other key administrators to discuss how we can best support and integrate within established internal programs and initiatives.

We also offer a dedicated first responder/public safety helpline number that identifies the caller as a first responder. Our clinicians have received training on how to conduct specialized intake, assessment, and triage procedures for first responders in order to make the process more comfortable for this specialized workgroup. Under our EAP, we will seek to implement proactive solutions to meet the needs of the County's first responders/public safety personnel.



HUMAN-POWERED, TECH-ENABLED CARE APPROACH

While the delivery of our EAP + Work-Life Program is a profoundly human endeavor – people with expertise and compassion helping other people – leveraging innovative technology that is flexible, reliable, and accessible is key to delivering the greatest benefit to employers and members. *People are at the heart of what we do.* We understand the power of technology and how to harness it to engage and empower individuals to access the care they need when they need it. Our digital technology strategy does just that. It is designed to provide a meaningful and positive experience for each member we serve throughout their wellbeing journey. We use technology to intelligently enhance and integrate the many facets of the member and customer experience- *without replacing the human focus.*



REDUCE SERVICE BARRIERS THROUGH INCREASED TELE-HEALTH OPTIONS

We seek to reduce barriers to services by providing multiple service access points via telephone, video, and live chat, as well as offering our Select a Specialist (asynchronous texting), Aware Mindfulness Program, and telephonic/video life coaching as part of our core EAP services along with the options of structured telephonic and video counseling, in-the-moment telephonic support, and Single Session Therapy, which is provided during the member's initial call into the EAP. Our goal is to make it as easy as possible for members to make that first contact and follow through with treatment recommendations.



PARTNER WITH THE COUNTY TO INCREASE EMPLOYEE ENGAGEMENT WITH THE EAP

Deer Oaks is always looking for ways to most effectively communicate and coordinate services with our client points of contact and with members. Kristina Herrera, the County's Program Manager, would like the opportunity to partner with Ms. Flores to discuss her preferred means of receiving service information and promotional materials moving forward. Kristina would also like to schedule quarterly 30-minute check-in meetings with a standing agenda to provide Ms. Flores with a scope of services review and discussion of any new or enhanced services that have been or are in the process of being implemented. This also provides an opportunity for them to discuss usage trends and specific workplace challenges that the EAP can assist in addressing.

Further, upon contract award, Kristina will be available to conduct implementation meetings and orientations for both County administrators and employees in order to fully educate them about the EAP and how to effectively use our services including all of the various access methods and member resources. We suggest conducting monthly 15-30 minute "Get to Know Your EAP" webinar sessions for the first six (6) months and at least quarterly EAP orientation webinars ongoing to continue to spread awareness of the benefit throughout the year. We will also provide monthly electronic promotional materials to the County POC including a flyer highlighting that month's online, on-demand topical seminar for distribution to employees as a way of continuous program promotion. We are also more than happy to attend open enrollment, health fair, and other health and wellbeing events throughout the year. The County may also consider hosting an EAP Awareness Day to bring additional focus to the benefit.



VALUE-ADDED PROGRAM ENHANCEMENTS

Deer Oaks seeks to continually enhance our EAP and work-life programs. As we implement new programming and technology, we pass on these enhancements to our clients oftentimes at *no additional charge*. Over the last few years, we have implemented a variety of program enhancements. Those indicated with **NEW!** are new to the County as part of the upcoming contract.

- ✓ Virtual Critical Incident Support services
- ✓ Clinical calls answered directly by master's level clinicians 24/7/365, ensuring a streamlined triage process and in-the-moment clinical assistance **NEW!**
- ✓ Confirmed match work-life referral packets **NEW!**
- ✓ Telephonic Leadership/Executive Coaching
- ✓ iConnectYou Mobile App
- ✓ iConnectYou Mobile App for Managers **NEW!**
- ✓ Select a Specialist (asynchronous texting) **NEW!**
- ✓ Aware Mindfulness Program
- ✓ Aware Mindfulness Channel **NEW!**
- ✓ Telephonic/Video Life Coaching
- ✓ In My Hands – Computerized Cognitive Behavioral Therapy (cCBT)
- ✓ Virtual Group Coaching sessions **NEW!**
- ✓ Innovative, re-imagined Work-Life Website including a new recently launched layout **NEW!**
- ✓ RMS Instant Messaging with a work-life consultant
- ✓ 70+ on-demand online seminars, with a new topic added monthly
- ✓ Webinar Catalog with topics developed and presented by our Director of Training, Greg Brannan. Topics may be customized for specific employee populations



- ✓ Supervisor Excellence, Leadership Certificate, Stress Management, and Pandemic Support Webinar Series

We continue to grow and fine tune our services and service delivery in order to stay current with industry trends and to offer our clients and their employees/members the most holistic suite of Civil Service EAP + work-life programming in the industry.

Together, over the past six (6) years, Deer Oaks and Webb County have developed a **successful employee well-being program**. By continuing to partner with Deer Oaks; the County, its employees, and their family members will continue to benefit from our more than three (3) decades of experience in the core EAP Services industry; our innovative, customized programming; and our “there when you need us most” philosophy. Our flexibility, ability to make decisions on the ground, and Can Do vs. Can’t Do approach to account management are key differentiators of Deer Oaks among its competitors. Plus, our extensive local and national network of affiliate providers enables us to quickly respond to requests for critical incident support services and referrals for in-person counseling.

We are excited about the opportunity to further our work with Webb County to put these words into action. We hope that you will consider our specifically designed, robust **Civil Service EAP + Work-life program** for your employees—a **program with proven results through healthy employee engagement and outcomes**.



Section 2: Firm Qualifications, Experience & References

Evaluation Criteria A

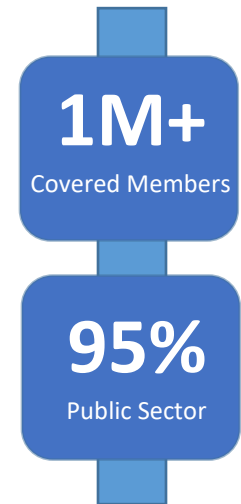
About Deer Oaks

A San Antonio, Texas-based national and global provider, Deer Oaks has successfully administered integrated **EAP + Work-life programming** to employers throughout Texas and the country for **32 years** and to **Webb County for six (6) years**. Implementing high-quality, built-to-suit EAP programming to employers at competitive rates is our core business. **In fact, 100% of our revenue is derived from EAP.**

Further, **with 95% of our membership comprised of public employers**, we have a long history and wealth of experience working with school districts, colleges/universities, and government agencies of all sizes at the federal, state, and local levels.

Our clients range from as small as two employees to more than 60,000 employees and include a number of organizations similar in scope and/or size to the County, including but not limited to, the following:

- Brazos County, TX
- Brownsville Housing Authority
- Brownsville Public Utilities Board
- Cameron County, TX
- City of Amarillo, TX
- City of Bryan, TX
- City of Carrollton, TX
- City of El Paso, TX
- City of Grand Prairie, TX
- City of Haltom City, TX
- City of Harlingen, TX
- City of La Marque, TX
- City of Mansfield, TX
- City of Midland, TX
- City of Mission, TX
- City of Rosenberg, TX
- City of San Angelo, TX
- City of Wichita Falls
- Collin College
- Dallas/Fort Worth Airport
- Fort Bend County, TX
- Hays County, TX
- Laredo College
- McAllen Independent School District
- Montgomery County, TX
- Socorro ISD
- Splendora ISD
- Texas Health & Human Services Commission
- Texas Department of State Health Services
- Texas Department of Family & Protective Services
- Texas Department of Motor Vehicles
- Texas Juvenile Justice Department
- Texas Military Department
- Texas Park & Wildlife
- Town of Flower Mound, TX
- University of Texas at Dallas
- University of Texas at El Paso
- University of Texas at San Antonio





Through strategic partnership, we serve as a trusted expert, contractor and consultant to our client employers. We understand that the County along with each department and employee group have their own separate needs and challenges; therefore, EAP services and service delivery need to be tailored at the County, departmental, and employee population levels, when necessary, in order to provide resources that are relevant to various cross-sections of the County's workforce. **Through this adaptability, we are able to apply the right programs, to the right departments, at the right time in order to proactively assist employees to better assess and cope with day-to-day challenges.**

Deer Oaks' rich combination of public sector expertise, industry focus, understanding of county culture, flexible programming, affordable pricing structure, and experience managing EAP administration for Webb County and other local government, large and small, urban and rural, makes us an ideal choice to continue to serve as the County's EAP partner.

Subcontractor Qualifications

Deer Oaks currently maintains a contractual relationship with **Workplace Options** to provide 24-hour call center operations and related services for its book of business. Deer Oaks first switched its work-life services to **Workplace Options** in 2012. We then expanded our relationship to include 24-hour call center operations July 1, 2013. By leveraging this partnership, Deer Oaks was able to centralize its call center operations and enhance quality control measures. In addition, with both EAP clinical and work-life personnel working under the same roof, using one case management system, and following the same quality standards, there was greater harmony among the service delivery philosophy, supervision structure, training methods, and operating procedures. This genuine integration allows for greater consistency in the management/delivery of services to our clients.

Alicia Barrera, Vice President, works directly with **Workplace Options** and oversees quality control over our contract and service delivery. She also has a direct relationship with Workplace Options' President & Chief Operating Officer who is committed to a long-term relationship with Deer Oaks. Our relationship is strong and stable as we continue to partner to offer our clients best-in-class integrated EAP, work-life, and wellness services.

Finally, Deer Oaks assumes sole and complete responsibility for the completion of all services provided under the contract including those provided by our subcontractor.

About Workplace Options

Founded in 1982, **Workplace Options** has grown to become the world's largest integrated employee wellbeing company. Their 21 global service centers support more than 75 million employees across 100,000 organizations in more than 200 countries and territories around the world through a variety of employee assistance, wellness, and work-life services.



**Human-centered
Wellbeing
Solutions**

*Driving positive
outcomes for
organizations
while transforming
people's lives for
the better.*



Section 3: Key Personnel & Affiliate Provider Network

Evaluation Criteria D

EAP Program Administration

The day-to-day operations of the EAP are managed by **Alicia Barrera, Vice President** with input from the **Executive Chairman, Paul Alan Boskind, Ph.D.** and **Chief Executive Officer, Susan Norris**. Alicia is responsible for the overall strategic and operational responsibility for staff, programming, and execution of services for clients; allocation of financial, material, and personnel resources to ensure contract performance; and ongoing programmatic excellence and quality assurance activities. **Kristina Herrera, Senior Account Manager** will continue to directly serve as Program Manager for the County's EAP contract, serving as the day-to-day contact. Business development activities are led by **Greg Brannan, Director of Business Development and Training**.

The lines of reporting authority and communication for the contract are clear and direct. **Kristina Herrera, designated Implementation & Program Manager** will interface and communicate directly with the County's Contract Officer and other key representatives. Contract requirements will be communicated by the County's Contract Officer to the Program Manager directly. The Program Manager will take the actions required to implement the requirements. Kristina will have full authority to make staff and resource decisions for the contract and will be solely responsible for contract performance. She will ensure that all necessary steps are identified and implemented as needed to ensure superior contract performance.

We also employ **300+ staff and subcontractor personnel** in the roles of executive leadership, program management, account management, marketing, administrative support, clinical, work-life, and call center management and support staff that would fully support this account in addition to your Program Manager. All client information is maintained in a central contract management system; therefore, every staff member has access to your program design, processes, and procedures so they can step in to assist when needed. Someone is always here to assist!

Finally, we maintain a **network of 50,400+ affiliate counselors nationally** including **5,336 affiliate counselors in the State of Texas** who are contracted to provide in-person, short-term counseling and related services to our client employees and their family/household members. Through these resources, Deer Oaks has the established operational infrastructure and existing workforce necessary to continue to accommodate the County's contract upon award.



Key Program Personnel



Kristina Herrera: Implementation & Program Manager

Kristina Herrera will continue to serve as Program Manager, serving as the County's day-to-day contact. Ms. Herrera brings more than 12 years of EAP account management experience to her role. She will lead the contract implementation process and be responsible for the overall contract management, reporting, communications, marketing, billing and complaint resolution for the County.

She is available during normal business hours, as well as after-hours via the Helpline, to provide support and information. Through monthly check-in calls, quarterly utilization review meetings, and on-going dialogue, she will keep the County informed of program usage, trending data, and suggested specialized programming and/or support based on presenting issues, organizational strategies, and goals. She will also lead program awareness campaigns including the distribution of promotional materials and suggested training opportunities and partner with other County-sponsored programs and benefits as needed. She is here to fully support the County's organizational and program goals and objectives and is available as needed daily to support the County through this contract.

Kristina has a Bachelor's degree in Criminal Justice from the University of Texas at San Antonio and is fluent in both English and Spanish.

Executive Support Staff



Alicia Barrera: Vice President

As Vice President, Alicia has overall strategic and operational responsibility for staff, programming, and execution of services for clients. She provides support to the account management team and assists with quality assurance activities. She has more than 29 years of experience in the EAP field and has been a team member since 1995. She served as Deer Oaks' Director of Account Management prior to her promotion to Executive Director in 2014 and to Vice President in 2024.

Alicia holds a B.A. in Interdisciplinary Studies from the University of Texas Pan American and is bilingual (English, Spanish).



Greg Brannan: Director of Business Development & Training

Greg Brannan, Deer Oaks' Director of Business Development & Training serves as our primary contact during the RFP process and supports training/marketing program development and implementation for our clients. He develops and conducts issue-focused and professional development webinar series and conducts executive coaching sessions for our client employers. He has more than 20 years of industry experience, 16 years of training experience, and 12 years of experience at Deer Oaks.



Greg holds a Bachelor of Science in Speech Communications from the State University of New York, College at Brockport. He also attended the Graduate Program in Marriage, Family & Child Counseling from Pacific Christian College.

Key Personnel Resumes are uploaded as an attachment within the Ionwave System.

24/7 Clinical and Work-life Service Delivery Teams

Our EAP program design involves the use of our telephonic counselors (master's level), our team of work-life consultants, and national network of affiliate counselors to deliver services to members accessing their **Civil Service EAP + Work-Life benefit**. Our staff counselors deliver in-the-moment telephonic support, intake, triage, telephonic counseling, video counseling, and case management services, while affiliate providers deliver face-to-face counseling and some telephonic counseling.

The various call center teams experience qualifications are detailed below:

- **Telephonic Counselors:** All of our in-house counselors have a minimum of a master's degree in social work, counseling, or a related area of study and at least two years' experience providing direct counseling or mental health services. Clinicians providing telephonic or online counseling are licensed mental health professionals. Our intake staff has solid experience in intake and crisis management, clinical assessments, chemical dependency, trauma response, and other relevant interventions. Counselors are required to complete our induction training including assessment skills training, risk assessment and crisis response, and outcome management; participate in ongoing training; and are supervised by a clinical management team.

Work-Life Consultants

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

For telephonic advice and in-person legal consultation, we maintain a network of attorneys throughout the United States, Puerto Rico, the US Virgin Islands, and Canada to whom we refer. The qualifications to be included on our legal network are listed below:

- **Telephonic Advice Attorneys:** Must be a general practice attorney; have an active license in the state(s) for which he or she will be taking calls; managing partners must have a minimum of 10 years' experience; and associate attorneys must have a minimum of three years' experience following being admitted to the bar.



- **In-person Attorneys:** The firm's managing partner must have a minimum of five years' experience, and associate attorneys must have a minimum of three years' experience, following admission to the relevant state's bar association; Individual attorneys must be licensed in the state in which they practice.

National & Regional Affiliate Provider Network

Much like your employee health plan, Deer Oaks maintains and utilizes an affiliate network of credentialed mental health providers to whom we refer members for in-person assessment, EAP counseling, and related services.

Our extensive **national network of 50,400+ counselors** are located in every state and Puerto Rico, thus enhancing service access for employees who may be traveling, dependents who are attending college out-of-state, or employees who choose to retire outside of their home state. By calling the Helpline, they can easily access the full scope of EAP and work-life services and receive appropriate referrals in their particular location domestically.

Below is a summary of our affiliate clinical network for Webb County:

- 5,336 affiliate clinical providers in the State of Texas
- 13 affiliate clinical providers within Webb County/25-mile radius of zip code 78040

Webb County EAP Affiliate Provider Network: By Provider Type	
Provider Type	# Providers
Master Level Clinician	10
Professional Counselor	1
Psychologist	1
Social Worker	1
81 Clinical Affiliate Providers	

Affiliate Provider Qualifications/Credentialing

In order to be accepted into our affiliate network, each provider must meet the following minimum standards, which are primary source verified in accordance with the National Committee for Quality Assurance (NCQA) standards each time a provider is credentialed and re-credentialed (every three years).

- Possession of a minimum of a master's degree in a mental health discipline
- Five years minimum post master's experience in the direct provision of clinical care
- Current and unrestricted license as a mental health practitioner at the independent practice level
- Maintenance of professional liability insurance at the level of \$1 million per occurrence and \$3 million aggregate
- Attestation/disclosure to the existence of prior sanctions or limitations to license, malpractice claims history, the existence of felony convictions, and the ability to perform the essential functions of an EAP counselor



Section 4: Program Approach & Scope of Work

Evaluation Criteria B

As an **integrated provider of Civil Service EAP + Work-life solutions**, Deer Oaks is positioned to continue to deliver the most seamless services to County employees, retirees, and family members. We have the knowledge and capability to provide employees with the most **holistic support** to achieve efficient and thorough resolution of their issue.

Unlike many of our competitors that utilize separate call centers and/or organizations for the provision of EAP, Work-life and Wellness services, as well as after-hours Helpline coverage, the Deer Oaks program is delivered **24/7 by EAP and Work-life staff members** who are working under one roof, using one case management system, and following the same quality standards. This **genuine integration** allows for greater consistency in the management and delivery of services to our clients.

Further, employees of a truly **integrated Civil Service EAP + Work-Life program** are the best equipped to identify underlying issues and develop a plan for addressing all of the employee's needs.

For example, an employee may be overwhelmed by the loss of her parent, who had been the caregiver for her young children. With just one phone call, we can begin the process of arranging face-to-face counseling sessions, locating referrals for local support groups, and identifying suitable childcare providers near the employee's worksite.

Our services are designed to support employees with a **wide range of emotional health issues** when short-term counseling has been deemed appropriate. These are issues for which we can assist in facilitating a positive outcome within a number of sessions offered over a short period of time. The therapy concentrates on helping individuals identify the skills, strengths, and resources that are already present and moves them towards a solution. **This model has been proven effective in helping address employees' personal and professional issues, helping them to avoid being absent from work or helping them to return to work as quickly as possible.** Examples include but are not limited to stress, bereavement, depression, anxiety, relationship issues, dependent care concerns, wellness, substance abuse/dependence, and addictions.

Deer Oaks accepts **unlimited self-referrals, supervisory-suggested referrals and formal management referrals to the EAP**, as well as offers a **full suite of Work-life services and organizational management services**. Our counselors are experienced at accurately assessing the presenting problem(s) during the initial assessment and identifying the appropriate type and level of assistance needed to effectively assist the participant in resolving his/her issue. A referral is then coordinated to one of our **50,400+ affiliate providers nationally**, selecting a provider that best meets the member's individual needs.

We also offer a number of **tele-health options** including structured telephonic counseling, video counseling, asynchronous texting, an online Cognitive Behavioral Therapy program, telephonic Aware Mindfulness Program, and telephonic/video life coaching. We find that offering these tele-health options increases program access and reduces stigma that sometimes prohibits individuals from accessing mental health services.



Further, if the presenting issue(s) fall outside of the scope of the EAP or require longer-term treatment, we offer resources to ensure that the employee is placed on **the path he/she needs to get more intensive support**. This may include a referral to the employee's health plan or to local community resources. We utilize internal provider databases and our research teams to locate appropriate referrals for each member.

Finally, our **Civil Service EAP + 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**.

Eligibility

Deer Oaks does not require verification of eligibility in order to gain access to our services. Eligibility is assumed based on the attestation of the member. During the initial intake, our clinicians ask questions to capture the following demographic information: company name, caller's name, callback number and/or e-mail address, and physical address; although, the only information an individual must disclose is the organization for which he/she works. No further information is required, and individuals do not have to disclose their name if they do not wish to, and they may use a pseudonym.

Further, employees who terminate their employment for any reason may continue to access the EAP for six (6) months post-employment.

EAP + Work-Life Access

Multiple Access Points

Deer Oaks understands that employees are busy, stressed, and work long hours. Therefore, we seek to make it as easy as possible for your staff to access their EAP benefit by offering a variety of 24/7 access points:

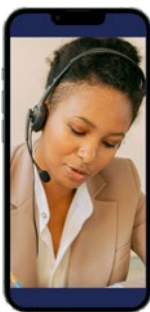
- **Toll-free 24-hour Helpline with clinical calls answered by master's level clinicians.** Because we do not have a prescribed process flow, our intake counselors are trained to listen closely to each member and to hear what is truly going on and what is being implied. They seek to guide each employee to a solution that addresses his or her individual concerns, which may require a multi-pronged approach of integrated EAP, work-life, and community resources—*all of which are addressed during the initial phone call.*

A Language Line is available to assist non-English speaking callers and a TTY line and text message options are available to assist members with hearing impairments. Live English and Spanish intake are available 24/7.



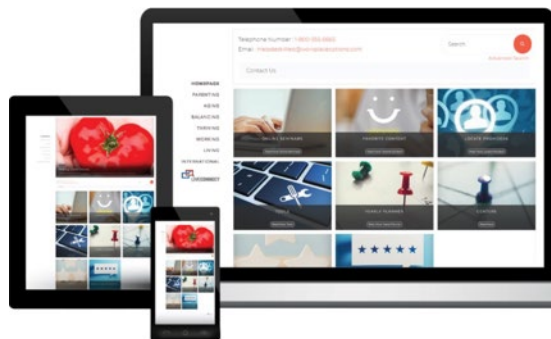


- **iConnectYou Mobile App** through which members may engage with their benefit via phone, video, or instant messaging. The app not only allows users to initiate contact with the program but can also be used to deliver structured telephone or video counseling. Informational resources and self-assessments are also available. iConnectYou is available as a free download via Google Play and App Store. We will provide employees with a code specific to the County to access the app's full features.
 - **iConnectYou Scheduler:** The Scheduler located on the iConnectYou App allows participants to book an initial conversation with one of our counselors. Participants can filter counselors based on languages, time zones, areas of expertise, and can schedule a phone or video appointment. The participant will then receive a confirmation email with access details. At the scheduled time, the assigned counselor will reach out to the participant to conduct our propriety assessment and determine the appropriate clinical intervention. As the service is available on a 24/7 basis, clinical services can take the form of immediate emotional support, or single-session therapy, during the initial conversation. Please note, the Scheduler does not allow participants to schedule follow-up sessions or appointments with counselors for structured sessions.
 - **Select a Specialist Asynchronous Texting** is an add-on communication functionality within our iConnectYou mobile app, which allows members to exchange asynchronous text messages with our specialists. Asynchronous texting means that members can write messages whenever they want and one of our specialists will answer within 24 hours. This service offers the convenience and comfort of a schedule-free messaging conversation. It is not counseling via text. This service provides members with convenient access to specialists who can provide support for day-to-day challenges in a stigma-free, convenient environment.
- **Real Messaging Service (RMS) Instant Messaging** through which members may chat live with a Work-life Consultant regarding childcare, elder care and other daily living work-life issues. The tool features simultaneous translation in over 100 languages.



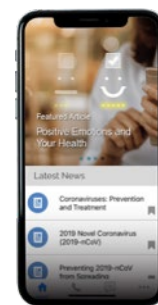
Direct-to-clinician phone access, anytime, anywhere

Our highly sophisticated network relies on behind-the-scenes technology to give first time and repeat callers the best experience possible.



Member Website with LiveCONNECT chat

Provides in-depth articles, assessments, videos, links, tools and webinars, and enables online chat and email requests.



Mobile app – iConnectYou

Mobile app that enables users to engage with a counselor via phone, video, text or chat, as well as schedule an assessment appointment and browse supportive content.



Intake, Assessment & Referral Process

The assessment process, which determines the need for counseling, begins at the case intake where demographic information is gathered and through a series of routine questions, the intake counselor screens for risk, identifies the presenting problem(s), and triages participants to the most appropriate resource(s) to meet their needs and preferences.

If the issue is determined to be clinical in nature, the member receives a thorough, telephonic clinical assessment with one of our counselors during the initial call that includes:

- Expert identification of the presenting problem or need
- Investigation into support systems
- Coping strategies
- Additional background information
- Mandatory risk assessment

If through the clinical assessment the counselor determines that a referral to a network provider for in-person short-term EAP counseling is necessary, the assigned case manager in coordination with our Network Advantage Team:

- **identifies and contacts counselors** from our network database based on the member's location, presenting problem, needs, availability, and counselor-client matching;
- **contacts a short-list of providers** to determine the provider's appointment availability, confirm that the information we have in our system is still correct, and that the provider will meet the member's needs; and
- **selects the provider that best matches the member's needs/requests** and provides the identified counselor's information to the member to schedule an appointment at a time that is convenient for him/her. This process takes the guesswork out of the referral process for your employees.

For in-person clinical EAP referrals, a confirmed provider referral is provided within **2-3 business days for routine cases** with appointment availability standard within five (5) business days. **For urgent cases, the confirmed provider referral and first appointment are provided within one (1) business day standard.** Because the member is responsible for calling the referred counselor to schedule an appointment at a time that is convenient for him/her, the actual time to appointment may be shorter or longer depending on when the member schedules the appointment. **In extreme crisis situations**, the case manager follows our established escalation procedure as warranted which may include **involvement of emergency services to preserve the member's safety.**

In addition to a confirmed referral for in-person counseling, we also offer **immediate in-the-moment telephonic support and Single Session Therapy**, which offer the member clinical support at the time of his/her call into the Civil Service EAP + Work-Life benefit.

We also offer **structured telephonic and video counseling sessions** as an additional option to receive counseling. As available, the scheduling of the first session can often be done during the initial intake call. The sessions will be scheduled ongoing with the same counselor to provide continuity of care.



38%
of callers present
with more
than one issue



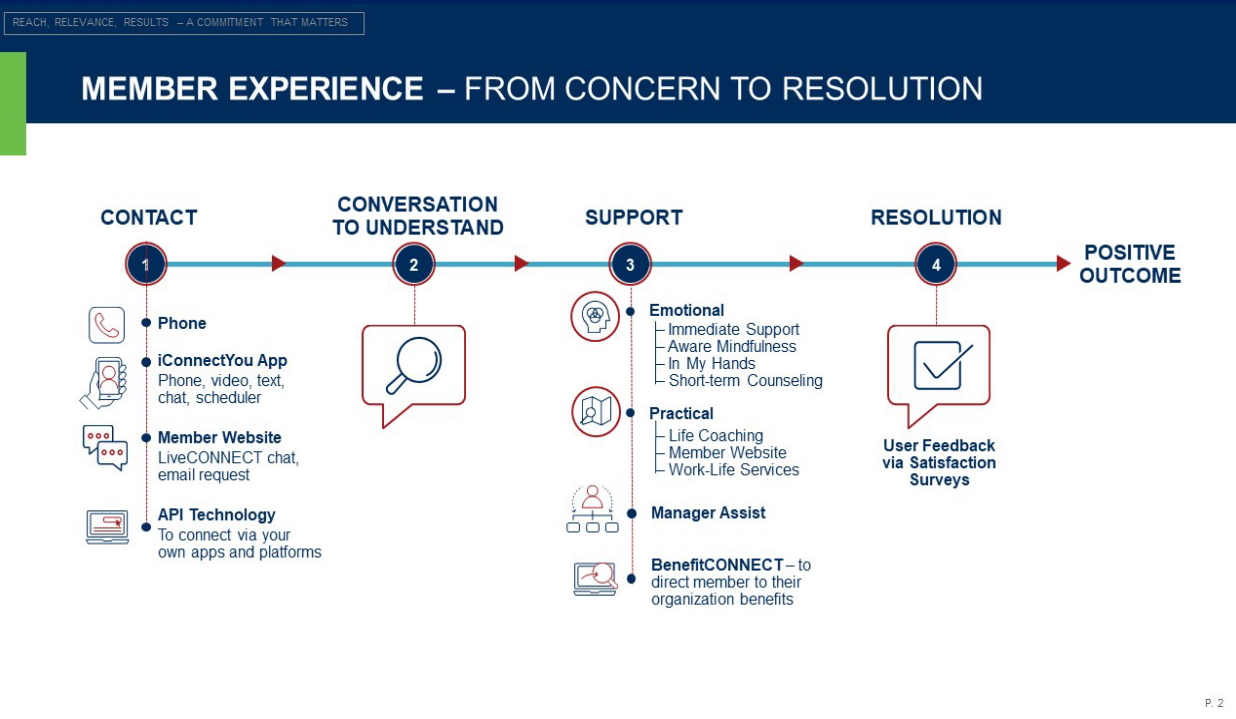
44
minutes average
call time vs. 10 minutes
industry standard



Finally, based on the specific case and the presenting issues, the counselor may recommend other modes of support including our Aware Mindfulness Program, telephonic/video life coaching, referrals to local support groups, or even a referral to the member's medical plan or other health and wellness benefits when appropriate.

DID YOU KNOW?

The more you do for an employee initially, the greater the success rate. Deer Oaks clinicians don't leave it to a stressed employee to go through a list of counselors. To get them quick access to quality mental health care, we provide immediate therapy in the moment, and if further help is needed, confirm an appropriate provider is available and send schedule options to the employee.





Short-Term Counseling

County employees along with their dependents and household members will be eligible to receive **up to six (6), eight (8), or 12 sessions per issue** for assessment and short-term counseling per 12-month period depending on the model selected by the County. **Counseling may be provided in-person, telephonically, or video based on the member's preferences and clinical suitability.**

The decision around the type of modality for counseling is participant-driven based in clinical guidelines. Each participant has individual needs and what may work best for one person may be the least desirable option for another. Our solution is to offer multiple forms of counseling to our clients' employees and allow them to help drive the decision about which option (in-person, telephonic, or video) would be most suitable, empowering them to feel most comfortable with the counseling process.

Members may access the EAP for support with a variety of personal and work-related issues such as stress, grief, depression, anxiety, anger management, marital/family/child issues, substance abuse, discrimination/harassment, workplace and domestic violence.



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 Management & Follow-up for Self-Referrals

- At the end of the sessions, the referred provider will provide our clinical staff with notes, which will be stored in our case management system. These notes are reviewed by our provider relations team. If there are any clinical indications that follow-up is needed, the case will be assigned back to the clinical case management team for outreach.
- For cases that involve minors, couples, family, and transitional support, the referred provider is required to complete a session review with our clinical team after the first session to ensure appropriateness and plan for ongoing treatment.
- For cases that are listed as imminent and non-imminent with regards to any risk identified (suicidal, homicidal, domestic violence, and/or child/elder protection concerns), the case manager will follow-up with the participant one day after the provider referral has been sent.
- Our Interactive Voice Response (IVR) survey captures the user experience voluntarily after the initial interaction (intake) with our staff. Participants reply "Yes" or "No" to three questions: "Did we help?", "Did you feel we cared about you and your request?" and "Did your organization make the right decision in hiring us to provide this service?" Participants are also provided the opportunity to leave a detailed voicemail message.



- We send post-services surveys to participants. The surveys pinpoint areas such as the professionalism and helpfulness of our staff, ease of access, improvement in functioning, problem resolution, and satisfaction with the overall delivery of services. We use an easy-to-complete, web-based survey that is sent out within five business days of the case being closed. Responses are generally measured using a Likert scale; however, some forms also have free text options to allow respondents to elaborate on their experience. All are anonymous; unless the participant specifically states identifying information. Responses are analyzed monthly, with issues investigated.

Support Beyond Counseling

Deer Oaks is unique in that it offers several additional support alternatives in addition to traditional short-term counseling. Our counselors may recommend one or more of the following support programs for members based on the initial assessment and presenting issues. Only one support modality may be used at any one time.



Aware Mindfulness Program (6-session program)

Stress can take a toll on organizations and their members. Poorly managed stress can contribute to reduced productivity, counterproductive behavior, and absenteeism. To complicate matters, sometimes your high-performing members are most at risk. Aware is a mindfulness program developed to help counteract members' stress and maximize engagement by increasing focus.

- Designed to assist members with stress, challenges with improving focus, engagement, productivity, and resilience
- Members are paired with a dedicated Aware specialist for six weekly telephonic consultations.
- Each session includes education, resources, and support for the member's customized practice plan, as well as a mindfulness exercise
- Specialists are wellbeing professionals trained in mindfulness principles and cross-trained in holistic wellbeing



In My Hands – Computerized Cognitive Behavioral Therapy (cCBT)

In My Hands provides self-managed computer-based Cognitive Behavioral Therapy (cCBT) as an alternative to telephonic and in-person counseling. It is an effective treatment for anxiety, stress, and mild to moderate depression, and can assist with building resilience. In My Hands has several features that set it apart from other online counseling programs, including involvement by our clinical counselors at every step in the process and integration with an evidence-based measuring tool (Outcome Rating Scale) to objectively monitor a member's progress.

- Helps increase productivity and mitigate absenteeism among members experiencing stress, anxiety, and depression
- Improves members' coping and resilience
- Enables members to easily access CBT self-management tools anywhere, anytime



Telephonic/Video Life Coaching (6-session program)

Personal growth, positive change, and improved performance at work are just a few of the reasons why members seek out life coaching. The Life Coaching program provides members time with professional coaches committed to helping them become the best version of themselves. Life coaching is available to members at all levels of an organization, not just those in upper-level management. Coaching support is recommended for an entire organization for optimal impact.

- Coaches use motivational interviewing techniques to help guide members in establishing a personal vision, determining goals, and creating an action plan
- Members are engaged in a creative process of self-discovery that draws on their intrinsic motivation to change
- Coaches provide supportive emails to share resources and check progress

Specialized Program Approach for First Responders

Deer Oaks has experience serving first responders including law enforcement, EMS, fire, correctional officers, and case workers through EAP contracts with State and local government and the Federal Law Enforcement Training Centers (FLETC). Through this experience, we have developed a wealth of experience in working with first responders and have adapted our approach to best serve this population.

An overview of our specialized services for first responders is provided below:

- **Dedicated First Responders Helpline number**, which identifies the caller as a first responder when answering the call. Our clinicians have received training on how to conduct specialized intake, assessment, and triage procedures for first responders in order to make the process more comfortable for this specialized workgroup.
- **Actively recruit providers on our affiliate provider panel** where available that specialize in counseling high-risk populations and understand their unique challenges.
- **Specialized outreach and education for first responder/safety personnel** to encourage program utilization and the confidential nature of the EAP.
- During implementation, **meet with HR and key department administrators** to determine objectives, goals, gather historical information, and discuss how we can best support established internal programs and initiatives such as peer support groups.
- **Consultation on critical incident response teams** and other internal committees.
- **Tailor critical incident response** for law enforcement/corrections/fire, etc.
- **4-part First Responder Training Series** covering the following topics: Feeling the Impact of Trauma - Reach out for Help, Reaching My Limit – When do I reach out for help?, “This one got to me” – Emotional Triggers, and Mindfulness and Meditation for First Responders
- Offer our **Aware Mindfulness Program and telephonic/video life coaching** as complements to counseling. These programs can assist high risk personnel in learning mindful techniques and strategies that they can incorporate into an individualized practice plan. Establishing short mindfulness habits improves self-care, reduces stress and increases resilience. Mindfulness-based stress reduction can also assist with focus, clarity and impact first responders’ capacity to make effective decisions during times of crisis.



Other Referrals

Referrals Outside of the EAP to the Health Plan or Community Resources

Although 95% of EAP-appropriate cases are resolved within the EAP across our book of business, there are cases that require assistance beyond the EAP in order to best meet the individual's needs. Therefore, a seamless transition from the EAP to the individual's health plan is vital to the success of our program.

- If the initial assessment establishes that long-term specialist counseling is required, or if this is identified at an early stage of the counseling process, then we can make an external referral to the employee's health plan or to community resources to ensure that the employee is placed on the path he or she needs to get more intensive support. The types of referrals provided vary based on the service delivery systems, government programs, laws governing information and advice, and private resources. We utilize internal provider databases and our research teams to locate appropriate referrals for each member.

Long-term specialist counseling is not included in the cost of the EAP and will be the responsibility of the member and/or the health plan when appropriate. If the member does not have medical insurance, our team will coordinate referrals to low cost and/or no cost resources based on availability.

- As part of the transition to long-term care, Deer Oaks can offer one **Transitional Support session** to members when there is no reason to believe that a referral to **Transitional Support** could be harmful to the member's well-being. The **Transitional Support session** can be used to increase the participant's motivation to engage in appropriate ongoing services, improve resilience and manage anxiety around longer-term issues while providing psycho-educational information.
- **BenefitCONNECT** is our solution to ensure that employees who make use of the EAP are also made aware of, and directed to, other appropriate benefits offered to them by their employer. Successfully making these connections ensures employees are aware of and appropriately referred to their other benefits, which is key to enhancing the service and reducing cost. Through **BenefitCONNECT**, we will catalog all relevant client benefits at implementation, whether they are unique to a specific location or a general offering available to all members. This information is saved in our case management system and is readily available for staff reference. This enables us to put a member in touch with the right person so they can take advantage of the right benefit.



Manager/Supervisor Support Services

Manager Assist: Unlimited Telephonic Consultation

Through a collaborative phone consultation, Manager Assist can provide unlimited telephonic specialized support and tools to help with the more challenging aspects of managing people, as well as building a high-performing team. A specialist can advise on handling issues such as:

- **Addressing low performance** – Poor performance is often a symptom of an underlying cause. We help the manager get to the root of the problem.
- **Informing associates of layoff or dismissal** – We guide managers to a fair and compassionate approach, while monitoring the effects of delivering the news.
- **Motivating individuals and teams** – Finding the best motivational approach and becoming good at it can make a world of difference.
- **Recognizing signs of troubled associates** – Managers are often in a position to sense issues early. We help them know what to look for and what to do.
- **Resolving a conflict between associates** – No conflict is alike. Our counselors give tools and advice on how to resolve various types of disputes.
- **Transitioning to/from a remote or hybrid environment** – People adapt to change differently, and special circumstances require unique problem solving.

Deer Oaks
puts people
first, so they
can keep
performing
effectively.

Mandatory/Management-Directed Referrals

Formal referrals of employees to the EAP are welcome and can be arranged quickly and easily. These referrals help an organization and/or manager to demonstrate duty of care towards an employee. Manager referrals can also be an integral part of an internal management process, such as a disciplinary or health-related protocol, and they can have the greatest impact on maximizing attendance.

- If a manager recognizes that an employee is experiencing stress and/or having attendance issues, he or she can refer the employee to the EAP to help resolve the issue. We offer **unlimited telephonic consultation** to supervisors attempting to manage employees with job performance problems. Our counselors can assist supervisors in processing the behavior/issues and determine the appropriate action i.e., coaching sessions, supervisor-suggested referrals, mandatory referrals, fitness-for-duty referrals, conflict resolution, etc.
- If the counselor and supervisor agree that a mandatory referral is appropriate, **the counselor explains the referral process, coaches the supervisor on how to engage with the employee regarding the referral and ensures that the supervisor has all of the applicable forms.** Neither the employer, nor Deer Oaks, can force an individual to seek assistance through the EAP, but provided that Deer Oaks has the signed consent of the employee, we will contact him or her as soon as the referral form has been received via confidential fax.



- **Reporting on the support provided is available with the signed consent of the employee.** The management referral paperwork will specify what level of reporting back to the manager/company representative has been agreed with the employee and the frequency of reporting. The information reported back to the manager or company representative will be dependent on the level of disclosure the participant has agreed in writing on the referral paperwork.

Upon case completion, a final summary report (where agreed) will be shared with the referring manager/company representative within 2 to 5 business days of the feedback being received from the clinician assigned to deliver the sessions.

- Referrals for both **mandatory substance abuse cases** and **Department of Transportation (DOT) Substance Abuse Professional (SAP) evaluations** will be coordinated to a SAP that meets the qualifications outlined by DOT Order 3910.1D, Title 49 CFR Part 40. DOT SAP evaluations and mandatory substance abuse cases are available on a fee-for-service, per case basis.
- Deer Oaks provides expert telephonic consultation to managers dealing with decisions regarding the need for a **Fitness-for-Duty 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.

Conflict Resolution Services

Deer Oaks is experienced at providing conflict resolution services in the workplace for our client employers to assist with resolving workplace conflict and interpersonal issues. We offer two levels of service.

- **Mandatory Referral for Off-Site Conflict Resolution:** two-party counseling at a provider's office via a formal mandatory referral. Please note some situations may not be appropriate for this option such as a manager-employee conflict. *This service is included within the proposed rates*
- **Third-Party Onsite Conflict Resolution:** A clinician comes onsite and meets with each party separately and then jointly, establishing an action plan and appropriate follow-up. *This program is fee-for-service and a minimum of four purchased hours.*

As part of this process, we provide input and advice to your HR department as to whether conflict resolution would be appropriate for each potential case through our telephonic management consultation service. Managers, supervisors and HR may call our dedicated Helpline for a management consultation and to request workplace conflict resolution.



Industry-Leading Work-Life Services

Deer Oaks' work-life services include legal and financial services, as well as child/elder/adult care and daily living consultation with confirmed match referrals. Our work-life consultation, resource, and referral service provides practical assistance to users around a wide variety of dependent care issues. As part of this process,

- **All provided referrals are qualified and matched to the specific needs** and requirements of the user—*100% of the time*. For example, is the agency within a reasonable distance of the member's work or home? Does the agency have availability meeting the member's requirements? Do the agency's fees meet the member's budget? Does the agency accept the specified form of payment?
- **Each agency is contacted to ensure availability** and to determine if it is an appropriate match for the employee's needs. During this call, the specialist verifies the data in the provider profile (e.g., fees, availability, address, hours of operation, program features, etc.) and updates the record.
- **The consultant then selects three (3) to five (5) providers** with confirmed vacancies that best meets the member's stated needs and provides them to the member in the agreed upon method.
- **Referral packets are provided to members** within three (3) business days for standard cases and within one (1) business day for urgent cases.

Through our work-life service, we are able to assist employees with day-to-day issues that make life challenging and can detract from personal and workplace productivity. From locating childcare, care for pets, personal care, and travel agents to locating home improvement contractors, education resources, and summer programs, we handle the consultation, research, and referral process from A-Z and provide referrals that are customized to the individual. Essentially, we help handle employees' to-do-lists, leaving them with more time for what matters most and less stress.

Below are sample topics for which our Daily Living and Dependent Care Teams can provide support.

- | | |
|---|---|
| • Adoption | • Apartment locators |
| • Childcare | • Chore services/house cleaners |
| • Back-up childcare | • Home repair (handymen, plumbers, electricians, contractors, etc.) |
| • Special needs care | • Entertainment services |
| • Summer programs and camps | • Pet obedience training/veterinarians |
| • Parenting skills | • Transportation and travel services |
| • Parenting classes | • Volunteer opportunities |
| • Playgroups | • Tutors |
| • Education K-12 programs | • Fitness and wellness centers/programs |
| • Higher education support and programs | • Moving/relocation services |
| • Caregiver support services | • Pet sitters/kennels |
| • Respite care | |



Legal Assist

Through our **Legal Assist** program, members may consult with a plan attorney – *for free*. We contract with a nationwide network of attorneys to provide consultation to employees or family members regarding their legal concerns. Using our unique case management system, the caller initiates contact with a legal consultant who conducts the intake, confirms appropriateness and availability of the lawyer, and follows up to ensure client satisfaction and resolution.

Callers can obtain consultation for any legal issue, with the exception of those involving disputes or actions between an employee/dependent and their employer or EAP or for business issues.

Legal Assist offers two types of legal services to meet employees' needs. Offering both advice and local referral services ensures that all employees' legal needs are addressed in an appropriate manner.

- **Advice:** The majority of employees requiring legal assistance do not want or need to retain a lawyer. Their concerns can be resolved through a free telephonic advice service. In these situations, the legal consultant will transfer the employee to a qualified attorney for a free 30-minute consultation per separate issue.
- **Local Referral:** For employees who have an immediate need for in-person legal consultation, we refer the employee to a conveniently located lawyer with the appropriate expertise. These local lawyers provide a free half-hour consultation, and, in most instances, agree to discount their hourly fees by 25% if additional assistance is required.

Services include:

- **Free 30-minute telephonic advice or in-person consultation** with an in-plan attorney
- Consultation consists of analysis of the situation and advice on how to proceed. There is no document review or creation during this free consultation
- If representation is required, members receive a **25% discount off hourly attorney fees**
- Covered Issues Include: family law, criminal, bankruptcy, adoption, elder care/ wills/ trusts/estate planning, probate, landlord/tenant issues, debtor/creditor, consumer Issues
- Excluded Issues: Employment as it relates to employees and family members, one's own business, class action lawsuits, taxes
- There is **no limit to the number of times you can use the service** for different issues
- Coverage available in **all 50 states**
- Telephonic attorneys cannot self-refer, so you are assured unbiased advice
- **Unlimited access** to online educational resources, links and tools
- **Interactive online will preparation**- create a legally binding simple state-specific will at no cost through a step-by-step online "interview process"



Financial Assist

Financial challenges are one of the most prevalent issues facing employees and households today. Therefore, offering a robust financial assistance program through the EAP is important to helping employees to become not only physically and emotionally fit, but also financially fit in order to better contribute to the workplace. With **Financial Assist**, employees can access a program of comprehensive financial support services—empowering them to concentrate on responsibilities at work, rather than on financial concerns.

Services include:

- Free **unlimited telephonic consultation with an Accredited Financial Counselor** qualified to advise on a range of financial issues such as bankruptcy prevention, debt reduction, purchasing a home, and financial planning
- There is **no limit to the length of the consultation** or restrictions on repeated use of the service
- Counselors address issues via a toll-free information line, and follow up by mailing supporting educational materials
- Excluded issues include tax issues, counseling, advice or comparison of specific financial services or products
- After the appointment, the counselor will email and/or mail a summary of goals and steps along with any additional, applicable, educational materials and a quality survey
- All counselors are knowledgeable in a **wide range of financial topics**
- **Unlimited access** to a wealth of educational financial resources, links, tools, and forms (i.e., tax guides, financial calculators, etc.)
- Includes **self-improvement “Task Builders”** for interactive financial improvement
- Articles, worksheets, and handbooks



ID Theft Prevention & Recovery

Through our **Financial Assist** Program, victims of identity theft can receive telephonic consultation that will help them to recover from, and minimize the impact of, a breach of their identity.

- Provides victims **consultation with an Accredited Financial Counselor** who will discuss the situation with the member and provide consultation and information on steps that should be taken upon discovery of identity theft
- Consultation may include how identities can be stolen and common warning signs; how to obtain one's credit report(s) to look for indications of identity theft; how to read and understand one's credit report; and steps to take if identity theft is indicated
- **Free credit monitoring service** available via our work-life website
- Resource links, tip sheets, and brochures on avoiding and identifying identity theft are available along with referrals to full-service credit recovery agencies



Take the High Road Ride Reimbursement Program

Deer Oaks remains concerned about the safety of its EAP participants and others. Therefore, Deer Oaks reimburses EAP participants for their cab, Uber, Lyft, and other ride-sharing fares in the event that they are incapacitated due to impairment by a substance or extreme emotional condition. Such circumstances may include over consumption of alcohol, drowsiness due to medication, or extremely upset/troubled over a situation. This service is available in the United States once per year per participant (18+ years of age) with a maximum reimbursement of \$45.00, excluding tip. The process is simple, and like all other EAP services, confidential. Simply call the Deer Oaks Helpline for information regarding reimbursement.

Critical Incident Response Services

Deer Oaks has experience responding to small- and large-scale critical incidents including employee death, violence, workplace accidents, terror attacks, natural disasters, and layoffs/restructuring. In the event of a crisis, we provide efficient and compassionate support based on organizational needs and preferences aligned with clinical suitability. **We offer various responses, including information, practical support, telephonic crisis support, management consultation, on-site group meetings, and face-to-face counseling.** Our approach to critical incident response takes the initial approach of providing psychological first aid and assigning the most appropriate intervention under the circumstances.

99%

Critical Incident
Satisfaction Rating

Effective crisis response is not formulaic—every single incident is unique and therefore requires a unique response. Responding to a workplace redundancy requires a completely different approach from responding to an employee suicide. While we have a standardized process to ensure consistency and quality, our approach is built with flexibility to ensure the most appropriate response for every individual incident.

Therefore, **within 30 minutes of the notification of an incident**, one of our incident managers will engage the requesting representative in a **management consultation**. Our incident managers are **clinical trauma professionals** who will support you from the initial consultation, to establishment of the intervention plan, through the event and post event follow-up. Once the consultation is completed, the incident manager and company representative establish a **clinically appropriate intervention plan for the on-site event**, which will take place **within 24-72 hours**. During the onsite two-hour session, the clinician will help employees understand what happened, normalize their emotions, and provide psychoeducation.

Trauma counselors who provide onsite support are trained in our model and provide a wide range of support for individuals, groups, and managers on how to best support the organization and employees. The trauma professional is chosen carefully based on geography, the nature of the event, and workplace culture/demographics.

We also offer an unmatched level of post-incident support. This includes outreach to affected employees and guidance for managers, providing them with information on how to identify and support employees who may need assistance after the onsite response has concluded. We know that, in many cases, the impact of a trauma does not manifest immediately, but may take a few weeks. With our outreach, we ensure that no one falls through the cracks.



Resource Guides

When there is a widespread incident that impacts a number of clients, such as a natural disaster, terrorist attack, or virus outbreak, we develop a resource guide. Each of these handbooks contains educational information and tips on how to manage reactions to the incident. The guide is developed by our expert content team and is sent in electronic format to our clients for distribution to employees.

Professional Development & Training

Deer Oaks maintains a robust training program that is designed to assist the County in promoting a healthy and motivated work environment where employees are engaged and effective in their roles. The EAP can assist the County with providing not only mental health and wellness-related training, but also critical skills training such as soft skills and personal development. Our wellness and personal development topics may also be used by the County to provide important health and wellness education as a means of proactive prevention and may supplement other wellness initiatives in place through the County's employee wellness program.

As such, Deer Oaks has included an **18-hour annual service bank** that the County may use at its discretion in the following increments:

- **Six (6) hours annually** for EAP orientation webinars, customizable Webinar Catalog seminars, and Virtual Group Coaching sessions
- **Six (6) hours annually** for onsite EAP Orientation, Training Catalog seminars, and health fair/open enrollment/event attendance
- **Six (6) hours annually** for 2-hour Critical Incident Support Sessions

This annual bank allows the County the flexibility to use hours on services that it needs in the moment, whether it be training, an EAP orientation webinar, or a representative to be onsite for a wellness event.

In addition to the 18-hour service bank, the following services are also included:

- **Pre-recorded EAP orientation webinar**
- **12 new on-demand online seminars** (1 per month). These on-demand seminars are pre-recorded and uploaded to the member website on the third Tuesday of every month.
- **70+ on-demand online seminars** via our member website
- **Access to the Annual Supervisor Excellence Webinar Series** (presented quarterly)
- **Tracking and reporting** of staff participation for onsite training, live webinars, and recorded webinars along with satisfaction surveys following each training.

Descriptions of the included training and support programs are detailed below:

- **Webinar Catalog:** The catalog includes more than 90 fully customizable seminars. These seminars are developed in-house and therefore may be customized for specific audiences around hot button topics and initiatives such as stress management, change management, and resiliency. Our Director of Training, Greg Brannan, will be available to consult with the County to discuss workplace challenges and current issues/topics and to develop various webinar series throughout the year specific to the County.



- **Virtual Group Coaching:** Designed to give employees a voice, these 60-minute sessions are available to assist employees through facilitated interactive roundtable discussions via Zoom. The intent of these virtual sessions is to provide a safe space for employees and/or supervisors to discuss as a group challenges or stressors they may be facing during these difficult times. Please note that these sessions are not intended for counseling or to act as a support group. Our Director of Training will lead the discussion and provide helpful tools and tips during the session. Sample topics appropriate for virtual group coaching include handling difficult conversations, teambuilding, transitioning through change, increasing resilience, and dealing with the stress of uncertainty.
- **EAP Orientation: onsite, on-demand, webinar:** Orientations provide employees with a thorough understanding of how the EAP works and allow the opportunity for them to ask questions. The orientation sessions focus on the practical aspects of the service, as well as the counseling, so that employees are aware of the broad scope of support that is available.
- **Training Catalog:** This catalog includes more than 50 off-the-shelf seminars available covering a variety of work-life, wellness and EAP topics in the following categories: People Management, Caregiving, Financial, Legal, Wellness, Personal and Professional Development. We utilize a network of local trainers to deliver onsite seminars for our clients.
- **4-part First Responder Training Series:** This training series covers the following topics: *Feeling the Impact of Trauma - Reach out for Help, Reaching My Limit – When do I reach out for help?, “This one got to me” – Emotional Triggers, and Mindfulness and Meditation for First Responders.*
- **Annual Supervisor Excellence Webinar Series:** Presented quarterly, this webinar series provides practical educational programs designed to help supervisors, managers, and other interested employees to build more engaged and productive work teams. This series is available to all supervisors, managers, and other interested employees.
- **Annual Supervisor Excellence Leadership Certificate Program:** Presented quarterly, this webinar series is designed to provide supervisors, managers, and other interested employees with enhanced skills to improve workplace morale, employee motivation, and staff productivity. Supervisors/managers that attend all four sessions either live or via online recording will receive the Deer Oaks Leadership Certificate. *Organizational participation for this series is available either on a fee-for-service rate or through a 4-hour deduction from the annual training bank.*
- **Annual Stress Management Webinar Series:** Presented quarterly, this webinar series is centered on stress management and is designed to provide your employees with the knowledge and skills necessary to cope more effectively with stress so they can live healthier and more productive lives. The series is open to all employees. Employees who attend all four sessions live or via online recording will receive the Deer Oaks Stress Management Certificate. *Organizational participation for this series is available either on a fee-for-service rate or through a 4-hour deduction from the annual training bank.*

Educational seminars are generally offered in 1-hour sessions. In most cases, we are able to schedule seminars and webinars during timeframes that best meet the needs of your workforce. We require a minimum of 10 participants per training, with special requests considered on a case-by-case basis. We do not have a maximum participation limit for onsite training. Our webinars hold 1,000 participants per session, with the option to hold multiple sessions per training opportunity. Finally, our onsite trainers



have a minimum of five (5) years of experience in their content area(s), are local to your communities, are knowledgeable of the industry, and familiar with workplace environments.

Our 2024 Training Catalog and 2024 Webinar Catalog are uploaded as attachments within the Ionwave system.

Program Promotion & Awareness Activities

We seek to maximize every opportunity to make a personal connection with employees, as well as to collaborate with client EAP coordinators and department heads to launch coordinated, multi-faceted promotional campaigns.

As the County's current EAP provider, we have already established **a strong partnership and healthy communication** between County representatives and Deer Oaks. **We are your partner, not just your vendor.** Through this working partnership, we will continue to develop custom, turnkey multimedia awareness campaigns spearheaded by your Program Manager.

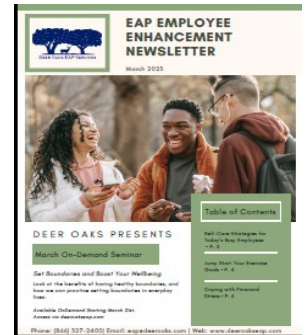
Over the years we have used **creative approaches** to both launch the EAP and build program awareness starting with a launch letter, then the distribution of wallet cards, flyers, brochures, and monthly supervisor and employee e-newsletters. Posters are provided for display in high traffic areas such as cafeterias, break rooms, bulletin boards and time clock areas.

Those initial steps **create awareness and interest**, which is then **reinforced by onsite and webinar orientations** that allow employees to interact, ask questions and learn about the program at a deeper level. We also provide pre-recorded webinar links that may be posted on the County's intranet site, on the HR website and included in an email for dissemination to employees.

Topic-specific, ongoing promotions are provided throughout the year to reinforce program awareness and stimulate continued utilization. We keep the messages fresh through the development of "Did You Know" campaigns, monthly flyers on topics of interest to employees and in line with the employer's wellness initiatives, on-demand online seminars, monthly orientation webinars, and reminders to managers and supervisors of how the EAP can be used as an effective management tool and to assist in dealing with difficult employee situations.

We establish a **calendar of monthly themes** that reflect topics of interest to working people such as work-life balance, wellness, childcare, elder caregiving, and legal and financial issues. Our materials focus on positive outcomes to typical challenges and embrace a broad selection of employee assistance and work-life topics.

We welcome the County's input into these promotional activities, as with all features of the program, and can customize a plan to meet your requests. Our marketing materials and communication methods vary, taking into account factors such as demographics, generational differences, lifestyles, and client preferences. We can tailor webinar training, materials, and awareness campaigns that address hot button issues and challenges facing staff. Although hard copy materials are made available





during implementation and as requested, we have found that ongoing electronic/camera-ready materials are an effective and sustainable means of program promotion.

In addition to the above activities, it is also important that leadership send the signal that it is not just okay to use the program, but they actually encourage use of the EAP. Our experience shows that when the EAP is openly embraced by senior leadership, we see the highest utilization rates. Therefore, educating executive leadership, EAP Coordinators, and department heads about the EAP, its various uses and ways to spread the word internally will be a key element of our promotional strategy.

Through this integrated multi-media promotional strategy, Deer Oaks seeks to ensure that the County's diverse workforce continues to be aware of the benefits available to them through our **EAP + Work-life Program**, as well as ensure that key personnel have the knowledge to internally promote the program, leading to ongoing healthy program utilization.

Promotional Materials

Deer Oaks will provide the County with hard copy materials as requested and electronic materials on an on-going basis throughout the contract term. Material development, printing and delivery of hard copy materials to a central location for internal distribution is included within our costs. Materials are available in English and Spanish upon request.

Materials include, but are not limited to:

- Launch letter
- EAP brochure
- EAP wallet card
- Program flyers
- Topical/awareness flyers
- Monthly supervisor and employee e-newsletters
- Posters
- Fact sheets
- Did You Know Campaign Flyers
- Training Catalogs (electronic)
- Supervisor Handbook (electronic)
- Conduct onsite and webinar EAP orientations
- Articles, messaging for internal use
- Social media content

Partner with the County to Increase Employee Engagement with the EAP

Deer Oaks is always looking for ways to most effectively communicate and coordinate services with our client points of contact and with members. Kristina Herrera, the County's Program Manager, would like the opportunity to partner with Ms. Flores to discuss her preferred means of receiving service information and promotional materials moving forward. Kristina would also like to schedule quarterly 30-minute check-in meetings with a standing agenda to provide Ms. Flores with a scope of services review and discussion of any new or enhanced services that have been or are in the process of being implemented. This also provides an opportunity for them to discuss usage trends and specific workplace challenges that the EAP can assist in addressing.

Further, upon contract award, Kristina will be available to conduct implementation meetings and orientations for both County administrators and employees in order to fully educate them about the EAP and how to effectively use our services including all of the various access methods and member resources. We suggest conducting monthly 15-30 minute "Get to Know Your EAP" webinar sessions for the first six (6) months and at least quarterly EAP orientation webinars ongoing to continue to spread



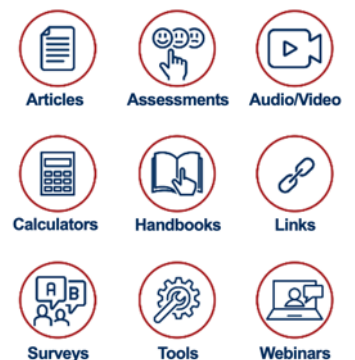
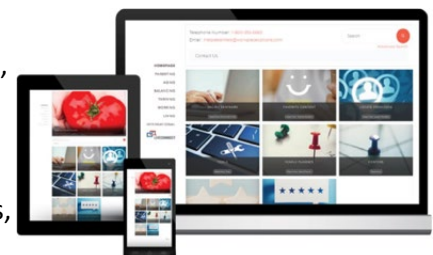
awareness of the benefit throughout the year. We will also provide monthly electronic promotional materials to the County POC including a flyer highlighting that month's online, on-demand topical seminar for distribution to employees as a way of continuous program promotion. We are also more than happy to attend open enrollment, health fair, and other health and wellbeing events throughout the year. The County may also consider hosting an EAP Awareness Day to bring additional focus to the benefit.

Engaging Work-life Website

County members will continue to have [unlimited access](#) to our members-only information via our [Member Work-Life Website](#). Throughout the website, a range of content types are provided—articles, resource links, calculators, self-assessments, audio and video files, online courses, and online seminars—to appeal to different types of learners and web customers. One hundred new articles are added to the website each month. URLs within existing content records are checked quarterly and entire content records are reviewed on a two-year cycle. Members receive an established organization-specific username and password to access the site, ensuring a confidential online experience.

Below is a comprehensive listing of the features of the work-life website:

- Customizable layout and content options including branding
- Many options available to include company-specific benefits information
- English and Spanish sites available
- Optimized for both Web and mobile devices
- Site is kept current and up to date, with 100 new articles added monthly
- 7 content divisions: Parenting, Aging, Balancing, Thriving, Living, Working, and International
- Searchable databases and resource links for childcare providers, elder care and related services, adoption resources, attorneys, certified financial planners, pet sitting, private and public high schools and colleges, and volunteer opportunities
- 40 financial calculators
- Over 90 streaming audio files and 100 video files covering a range of health and emotional health topics
- On-demand, online seminars each month, with archiving of past seminars
- Links to Monthly Employee and Supervisor Newsletters
- More than 8,000 regularly updated articles
- News for You updated monthly, now featuring the option to add customized tabs
- Rotating features on Module pages
- A new Homepage featuring new articles and resources each month
- Savings Center: a discount shopping program offering employees up to 25% discounts on name-brand goods and services
- Relocation Center: a collection of resources that allows users to learn about communities across the United States, providing vital statistics
- More than 100 ready-to-use legal forms provided by Nolo
- Access to Mayo Clinic medical and health information





Demo Site

Below are the link, login and password for the demonstration website. As a demo site, some features may not be fully enabled.

<https://helpwhereyouare.com/CompanyLogin/1601/deeroaks>

company code – deeroaks company password – demo22

Utilization Reporting

Deer Oaks believes in the importance and utility of reporting to employers on the utilization patterns of the employees and dependents covered through the EAP. Therefore, **standard utilization reports are provided electronically via email each quarter and annually** and include information requested by the County without infringing on member confidentiality. Monthly and ad hoc reports are also available upon request.

Our standard reports include data covering:

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

Please note that we do not provide any reports that could compromise employees' privacy. Therefore, we do not individually report on a division so small (≤ 100 employees) that there is a risk for disclosing individual employee information; such statistics are incorporated into organizational reports. For divisions with 100 or fewer employees, the only data to be provided is an indication of whether or not there was utilization within each department.

Your program manager reviews the detailed reports on an ongoing basis, monitoring utilization trends and the effects of various promotional campaigns. Through dialogue with County representatives and reviewing the utilization reports, your program manager has the opportunity to keep her finger on the pulse of the EAP services being offered, keeping an eye out for trends that may indicate a need for specialized support. She then applies these results to adapting the program as needed for the County, keeping in mind your organizational strategies and goals.

A sample standard utilization report is uploaded as an attachment within the Ionwave system.



Confidentiality

Maintaining client confidentiality is a fundamental requirement for all aspects of Deer Oaks' service provision. 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. The professional management of confidentiality insures that personally identifiable and sensitive information is protected from any unauthorized disclosure. Disclosure is allowable only when there is authorization by client consent, or when required by law.

Quality Assurance Plan

Deer Oaks monitors program participation/satisfaction, the quality of our services, and staff interactions with client employees through our quality assurance plan. We take a proactive approach to ensure that we deliver the highest quality services to our clients and their employees. Our call service centers hold International Organization for Standardization (ISO) 27001 certification. We conduct internal audits of call center personnel each month consisting of silent call monitoring, clinical case work review, work-life case work review, and secret shopper programs. We also provide an Interactive Voice Response (IVR)-based satisfaction survey offered to users live at the end of their initial phone call with a counselor or work-life consultant and at case completion, an online survey for completion following case closure, and surveys following each training and critical incident response. A formal grievance procedure is also in place, and we are fully committed to taking immediate action and corrective steps if deficiencies are identified by our clients.



Section 5: Cost Proposal

Evaluation Criteria F

Deer Oaks EAP Services Civil Service EAP + Work-Life Program Cost Proposal Webb County		
Rates are per employee per month (PEPM) based on 1,547 employees.		
Counseling Visit Model	PEPM	Estimated Annual Premium
6-visit model	\$1.43 PEPM	\$26,546.52
8-visit model	\$1.69 PEPM	\$31,373.16
12-visit model	\$2.02 PEPM	\$37,499.28
Rates are guaranteed for three (3) years with a 3% increase in each years 4 and 5.		

SCOPE OF WORK	
24-hour helpline with clinical calls answered by master's level clinicians	✓
Telephonic translation service (200 languages) and TTY Line	✓
Unlimited, Immediate Support with a Counselor – In-the-moment issue resolution	✓
Up to six (6), eight (8), or 12 sessions of structured counseling per employee/family member per issue per year depending on the model selected by the County; available modes of counseling: telephonic, face-to-face, or video	✓
Access to a credentialed provider network of >50,400 affiliate counselors nationally	✓
Unlimited formal management referral coordination & case management	✓
Self-assessments available on the iConnectYou App covering addiction and stress/burnout	✓
iConnectYou mobile app offering access to informational resources and instant video, text, or phone chat with a counselor	✓
Aware Mindfulness Program – A six-session mindfulness program to improve wellbeing, focus, and engagement; includes individualized coaching and resources	✓
Select a Specialist Asynchronous Texting via the iConnectYou App	✓
In My Hands computerized cognitive behavioral therapy (cCBT) including scheduled case manager follow-up and additional support as needed	✓
Life Coaching – Up to six sessions of virtual (telephone or video) life coaching to help employees navigate life transitions and maximize personal and professional potential	✓
Manager Assist – unlimited specialist telephonic consultation for HR/managers	✓
Work-life consultation and resource support for topics including but not limited to dependent care, household services, legal/financial services, and wellness services	✓
Take the High Road Ride Reimbursement Program – one free ride per year with reimbursement up to \$45.00 (excluding tip) for participants 18+ years of age within the US	✓



Customizable website with resources and OnDemand training	✓
BenefitCONNECT – Counselor training on all related company-sponsored benefit programs and cross referral procedures – leveraging all resources to maximize employee support	✓
Promotional materials – Electronic and hard copy materials available in English and Spanish as needed.	✓
18-hour annual service bank that may be used at the County’s discretion in the following increments: • <i>Six (6) hours annually</i> for EAP orientation webinars, customizable Webinar Catalog seminars, and Virtual Group Coaching sessions • <i>Six (6) hours annually</i> for onsite EAP Orientation, Training Catalog seminars, and health fair/open enrollment/event attendance • <i>Six (6) hours annually</i> for 2-hour Critical Incident Support Sessions	✓
Organizational access to Annual Supervisor Excellence Webinar Series (presented quarterly)	✓
12 Online OnDemand Training Seminars (available once per month plus an archive of past seminars—available in English & Spanish)	✓
Designated San Antonio, Texas-based Program Manager	✓
Quarterly & Annual Utilization Reports by employee population and location	✓
Quality Assurance Program & Performance Tracking	✓
6-Month Coverage Post-Employment	✓

Optional Service List	
Onsite Orientation*	\$300.00 per hour
Webinar Orientation*	\$150.00 per hour
Training Catalog Seminars*	\$300.00 per hour
Webinar Catalog Seminars*	\$150.00 per hour
2-hour Critical Incident Support Events*	\$600.00 per 2-hour event
Additional Authorized Critical Incident Support Hours <i>beyond the initial 2-hour event</i>	\$300.00 per additional hour
Health Fair/Event Attendance*	\$150.00 per hour
Virtual Group Coaching Session*	\$300.00 per hour
Department of Transportation (DOT) Substance Abuse Professional (SAP) Evaluation	\$600.00 per case
Mandatory Substance Abuse Cases	\$600.00 per case
Third-Party Onsite Conflict Resolution	\$300.00 per hour with a minimum of four purchased hours
LiveWell Telephonic Wellness Coaching	\$0.46 PEPM
1:1 Telephonic Executive/Leadership Coaching	\$500.00 per hour

* Beyond the specified allotted amounts within the 18-hour annual in-service bank



Electronic 508 Accessibility Remediation Price List

WCAG 2.0 AA Website Option Available	Included as an option in addition to our standard site for no additional charge
508 Remediation of Electronic Promotional Materials Under 2 pages i.e., flyers, topical handouts	Included <i>A cost may be incurred for longer and more complex documents.</i>
On-Demand & Webinar Catalog Recordings: Addition of Closed Captioning & Transcript	\$300.00/recording
Electronic PowerPoint Presentation Slide Handout 508 Remediation	\$300.00/slide deck
508 Remediation of Electronic Utilization Reports	At cost- invoice will be provided to the County

Program Exclusions & Limitations

- o Counseling services beyond the allotted sessions covered in the plan
- o Counseling for long-term issues that fall outside of the EAP's short-term intervention model
- o Counseling for minors aged four and younger. Because of the complexity of the needs of children 4 and younger, a short-term counseling model is not appropriate, although we support the family in finding appropriate resources
- o Court ordered treatment or therapy, or any treatment or therapy ordered as a condition of parole, probation, custody, or visitation evaluations, or paid for by Workers' Compensation
- o Fitness for duty evaluations/determinations which are used to evaluate whether an employee is safely able to perform his or her duties, such as psychological testing and a written report, although a referral may be provided
- o Formal psychological evaluations which normally involve psychological testing and result in a written report, although a referral may be provided
- o Inpatient treatment of any kind, or outpatient treatment for any medically treated illness
- o Investment advice (nor does plan loan money or pay bills)
- o Legal representation in court, preparation of legal documents, or advice in the areas of taxes, patents, or immigration
- o Prescription drugs and psychiatrist services, although a referral may be provided
- o Services by counselors who are not participating providers
- o Authorization for leaves of absence or time off



Section 6: Proof of Financial Stability

Evaluation Criteria C

Deer Oaks has the financial stability to provide the scope of services requested in this RFP to Webb County. As a privately-held Limited Liability Company, Deer Oaks is not required to have its financial statements audited; therefore, our internally-prepared financial statements are provided on the following pages for the County's review.

Deer Oaks - A Behavioral Health Organization

Balance Sheets

For Years Ended

	<u>2020</u>	<u>2021</u>	<u>2022</u>
ASSETS			
Current Assets-			
Cash	\$ 1,566,247	\$ 93,215	\$ -
Accounts receivable-trade, net	6,241,787	7,851,408	5,597,243
Accounts receivable-affiliates	885,536	883,054	1,035,624
Prepaid expenses	<u>379,292</u>	<u>325,376</u>	<u>393,866</u>
Total Current Assets	<u>9,072,861</u>	<u>9,153,054</u>	<u>10,326,733</u>
Property and Equipment			
Less:Accumulated depreciation	<u>(3,170,605)</u>	<u>(3,431,747)</u>	<u>(2,749,602)</u>
Total Property and Equipment	<u>960,278</u>	<u>1,025,430</u>	<u>1,346,071</u>
Other Assets-			
Organization costs, Net	14,874	9,036	3,577
Contested trade account receivable	4,813,287	6,484,698	7,154,193
Goodwill, net of accumulated amortization	<u>2,622,941</u>	<u>2,439,855</u>	<u>2,256,768</u>
Total Other Assets	<u>7,451,101</u>	<u>8,933,589</u>	<u>9,414,538</u>
Total Assets	<u>\$ 17,484,241</u>	<u>\$ 19,112,072</u>	<u>\$ 21,087,341</u>
LIABILITIES AND SHAREHOLDER'S EQUITY			
Current Liabilities-			
Short term notes payable to banks	\$ -	\$ -	\$ 1,901,297
Current maturities of long term debt	625,591	190,036	48,451
Accounts payable	55,863	128,186	343,786
Payroll liabilities payable	1,249,551	1,246,005	1,793,621
Commercial Card Liability	42,222	51,733	130,666
Accrued expenses	<u>348,244</u>	<u>739,004</u>	<u>525,613</u>
Total Current Liabilities	<u>2,321,471</u>	<u>2,354,964</u>	<u>4,743,434</u>
Long Term Debt, net of current portion			
Notes payable	<u>1,347,347</u>	<u>1,150,682</u>	<u>1,122,161</u>
Total long term debt	<u>1,347,347</u>	<u>1,150,682</u>	<u>1,122,161</u>
Total Liabilities	<u>3,668,818</u>	<u>3,505,646</u>	<u>5,865,595</u>
Shareholder's Equity-			
Common stock	2,000	2,000	2,000
Additional paid-in capital	1,275,241	1,275,241	1,275,241
Retained earnings	<u>12,538,182</u>	<u>14,329,185</u>	<u>13,944,505</u>
Total Shareholder's Equity	<u>13,815,423</u>	<u>15,606,426</u>	<u>15,221,746</u>
Total Liabilities and Shareholder's Equity	<u>\$ 17,484,241</u>	<u>\$ 19,112,072</u>	<u>\$ 21,087,341</u>

Deer Oaks - A Behavioral Health Organization
Income Statements
For Years Ended

	<u>2020</u>	<u>2021</u>	<u>2022</u>
Service Revenue	\$ 43,365,980	\$ 51,224,986	\$ 54,307,252
Cost of Services	<u>27,852,158</u>	<u>31,457,669</u>	<u>35,343,555</u>
	<u>15,513,822</u>	<u>19,767,318</u>	<u>18,963,696</u>
General and Administrative Expenses:			
Advertising & Promotion	147,879	193,593	298,188
Bank Charges	73,869	77,379	102,807
Computers & Internet	683,051	701,474	906,295
Contract Labor	720	983	49,453
Dues and Subscriptions	10,799	9,231	13,693
Salaries and benefits	11,913,089	12,051,476	12,922,197
Insurance	232,523	244,884	342,141
Janitorial and Pest Control	2,343	2,552	6,321
Maintenance & Repairs	10,601	18,659	14,528
Office Rent	942,301	941,408	972,029
Postage & Delivery	61,338	57,067	66,566
Printing	20,405	23,856	17,740
Professional Fees	256,948	299,672	427,207
Seminars and Conferences	48,649	46,642	60,757
Staff Meetings	8,125	12,108	38,347
Supplies and Office Expense	125,561	135,233	133,644
Taxes Other Than Income	59,604	66,293	61,284
Telephone & Fax	103,507	122,735	112,107
Travel & Entertainment	213,155	238,855	311,980
Utilities	<u>27,346</u>	<u>26,185</u>	<u>29,788</u>
Total	<u>14,941,812</u>	<u>15,270,285</u>	<u>16,887,071</u>
Income from operations	572,010	4,497,033	2,076,625
Other income (expense):			
Depreciation and amortization	(520,210)	(450,067)	(506,400)
Provision for losses	(1,816,611)	(1,465,000)	(1,532,000)
Interest, net (recurring)	628,024	(52,392)	(69,503)
Federal & State Income Tax	(97,536)	(261,908)	(353,401)
Other non-recurring expenses	5,768,385	(476,663)	-
Total	<u>3,962,052</u>	<u>2,706,030</u>	<u>(2,461,305)</u>
		-	
Net Income	4,534,062	1,791,003	(384,679)
		-	

Deer Oaks - A Behavioral Health Organization
Statements of Changes in Cash
For Years Ended

	<u>2020</u>	<u>2021</u>	<u>2022</u>
Cash generated (used) by operating activities:			
Net income	\$ 4,534,062	\$ 1,791,003	\$ (384,679)
Adjustments for items (requiring) providing cash-			
Depreciation and amortization expense	520,210	450,067	506,400
Provision for losses on accounts receivable-trade	1,816,610	1,465,000	1,532,000
(Increase) decrease in accounts receivable-trade	(54,352)	(3,074,622)	(2,577,834)
(Increase) decrease in accounts receivable-affiliates	(194,951)	2,481	(152,570)
(Increase) decrease in prepaid expenses	(68,396)	53,917	(68,490)
(Decrease) Increase in accounts payable	(221,668)	72,323	215,600
(Decrease) Increase in payroll liabilities payable	1,145,431	(3,546)	547,616
(Decrease) Increase in commercial card liability	42,222	9,511	78,933
(Decrease) Increase in accrued expenses	145,293	390,760	(213,391)
Total cash provided by operating activities	<u>7,664,462</u>	<u>1,156,893</u>	<u>(516,415)</u>
Cash used in investing activities:			
Purchase of property and equipment	<u>(246,655)</u>	<u>(326,294)</u>	<u>(638,495)</u>
Total cash used in investing activities	<u>(246,655)</u>	<u>(326,294)</u>	<u>(638,495)</u>
Cash provided (used) by financing activities:			
Proceeds from long term debt	5,457,000	-	
Principal payments on long term debt	(6,111,878)	(632,219)	(170,107)
Change in short term borrowings, net	(2,003,183)	-	1,901,297
(Increase) decrease in shareholder receivable	<u>(3,295,772)</u>	<u>(1,671,412)</u>	<u>(669,495)</u>
Total cash provided used by financing activities	<u>(5,953,833)</u>	<u>(2,303,631)</u>	<u>1,061,696</u>
Net increase (decrease) in cash	1,463,974	(1,473,032)	(93,215)
Cash at beginning of period	<u>102,273</u>	<u>1,566,247</u>	<u>93,215</u>
Cash at end of period	<u>\$ 1,566,247</u>	<u>\$ 93,215</u>	<u>\$ -</u>

Kristina Herrera

EDUCATION

B.A., Criminal Justice; emphasis in Juvenile Corrections
University of Texas at San Antonio, San Antonio, Texas - 2007

SUMMARY

Twelve (12) years of progressive experience working in the EAP Industry specializing in customer service, network work development/provider relations and account management. Highly customer focused and self-motivated with proven ability to assess a problem, develop a strategic plan and execute an action with minimal time and maximum effectiveness.

EXPERIENCE

Deer Oaks Behavioral Health Organization 2012-present

Account Manager, Deer Oaks EAP Services 2013-present

- Manage accounts for client organizations across the United States.
- Development of specialized services and programs based on the client's need
- Analyze EAP utilization and plans promotional activities accordingly
- Assist with consultations of crisis and mediation situations
- Resolves customer concerns and complaints
- Travel to locations as needed
- Contract implementation
 - Contract preparation and insurance requirements
 - Scope of Services delivery through on-site and webinar presentations
 - Customer Service and problem solving expectations
 - Contract management and Quality Assurance procedures
 - Quarterly Utilization Reports review with client organizations
 - Business Development strategic plan
- Provider Relations
 - Pre and post development
 - Contract rate negotiations and renewals
 - Insurance and licensure requirements and quality assurance



- Public Relations
 - Establish and maintain positive relationships with new and current customers as well as Health Care Providers for corresponding contracts.
 - Through strong relationships obtained letters of recommendations for business development opportunities.
 - Participate in Health Fairs, Open Enrollments, and local, state and national conferences.

Junior Account Management, Deer Oaks EAP Services

2012-2013

- Managed day-to-day operations of the Account Management team with respect to individual client group's needs
- Composed contracts as needed for new and existing clients
- Ensured contract compliance and quality assurance
- Conducted onsite EAP Orientations as requested by clients
- Composed and submitted monthly reports for client organizations in order to maintain contract compliance
- Developed and created promotional materials as needed
- Assisted with billing reports
- Composed monthly Supervisor and Employee newsletters to be disseminated to Deer Oaks' book of business

LANGUAGE FLUENCY

English and Spanish

Alicia Barrera

EDUCATION

B.A., Interdisciplinary Studies
University of Texas Pan American, Edinburg, Texas - 2002

SUMMARY

Over 29 years of progressive experience working in the Health Care Industry in various internal environments specializing in oversight of daily operations, customer service, network work development/provider relations and account management. Highly customer focused and self-motivated with proven ability to assess a problem, develop a strategic plan and execute an action with minimal time and maximum effectiveness.

EXPERIENCE

Deer Oaks Behavioral Health Organization 1995-present

Executive Director, Deer Oaks EAP Services 2014-present

- Strategic, operational, and financial responsibility of company
- Strategic and operational responsibility of staff and business partners
- Business Development strategic planning and financial oversight
- Program Implementation
- Initiative Development
- Programmatic excellence and quality assurance

Director of Account Management, Deer Oaks EAP Services 2003-2013

- Serve as a member of the Executive Management team.
- National Account Management for over 400 client organizations serving 1 million members.
 - 96% client organization retention
 - 98% client organization satisfaction
 - Developed department manuals, policies and procedures for daily operations.
 - Developed staff development trainings for Account Managers to include:
 - Contract implementation
 - Contract preparation and insurance requirements
 - Scope of Services delivery through on-site and webinar presentations
 - Customer Service and problem solving expectations
 - Contract management and Quality Assurance procedures
 - Developed a business plan for Chief Officers



- Analyzed profit and loss reports with CFO
 - Quarterly Utilization Reports review with client organizations
 - Business Development strategic plan
- Provider Relations
 - Pre and post development
 - Contract rate negotiations and renewals
 - Insurance and licensure requirements and quality assurance
- Public Relations
 - Established and maintained positive relationships with new and current customers as well as Health Care Providers for corresponding contracts.
 - Through strong relationships obtained letters of recommendations for business development opportunities.
 - Participated in Health Fairs, Open Enrollments, and local, state and national conferences.
- Call Center Operations Manager 2002-2003
 - 12 customer service care representatives serving 21 states and 800,000 members
 - Fielded all customer service complaints in a prompt and professional manner
 - Trained all call center staff on policies and procedures to ensure job success
 - Pre and Post Network Development
- South Texas Regional Operations Manager* 1995-2002
 - Managed day-to-day operations of seven clinical outpatient offices in Region 11 (Victoria, Corpus Christi, Brownsville, Harlingen, McAllen, Rio Grande City, and Laredo, TX)
 - Contract Manager for Texas Department of Family Protective Services contract for psychological services
 - Ensured contract compliance and quality assurance
 - Conducted weekly staff meetings and training
 - Staff training on implementation of new business
 - Developed and implemented administrative policies and procedures
 - 100% compliance in DFPS audits
 - Served as Public Relations Specialists for South Texas
 - Oversight of area revenues and clinical productivity
 - Managed billing staff-collectors, accounts receivable and payables department for MCR and Medicaid Insurance

LANGUAGE FLUENCY

English and Spanish (read/write)

Gregory A. Brannan

EDUCATION

Bachelor of Science in Speech Communications
State University of New York, College at Brockport, Brockport, NY

Graduate Program in Marriage, Family & Child Counseling
Pacific Christian College - Fullerton, CA

PROFESSIONAL EXPERIENCE

Deer Oaks EAP Services **1/12-present**
Director of Business Development & Training

Responsible for leading business development and expanding market share in both the government and private sectors. Also, develop and facilitate a wide range of organizational development programs and training seminars for employees and managers of clients and prospects.

Ceridian Corporation **6/09-1/12**
Government Business Development Executive

Marketed EAP, wellness, HR administration, and staffing services to federal, military and state agencies.

Adventist HealthCare/LifeWorks Strategies **10/01-6/09**
Employer Relations Manager

Marketed hospital, EAP & wellness services to private corporations/government agencies in the DC/Maryland area. Provided seminars on wellness, relationship skills, stress management, etc. as a primary visibility strategy.

National Mental Health Association **7/00-9/01**
Senior Director of Special Projects

Developed, implemented, and helped facilitate a comprehensive staff development and training program for a national non-profit.

Charter Behavioral Health Systems/Maryland **10/96-7/00**
Director of Business Development

Responsible for all aspects of sales and marketing including management of sales team of four in the turnaround of a psychiatric hospital.

Charter Behavioral Health Systems/Atlanta
Executive Director of Business Development

4/96-10/96

Worked as a corporate consultant and did site visits to psychiatric hospitals across the country to assess their marketing and sales plans. Also served as a corporate sales trainer.

Charter Behavioral Health Systems/North Carolina
Regional Director of Sales

8/94-4/96

Responsible for sales of hospital services to public and private entities throughout the State, including the management of a 16-member sales team.

Charter Behavioral Health Systems/Covina, CA
Professional Relations Manager/Assistant Director of Marketing

4/93-8/94

Responsible for the marketing and sales of hospital services to public and private entities in Southern California

New Life Treatment Centers
Intake Counselor/Director of Intake/Program Director

8/91-4/93

Managed psychiatric intake and clinical teams, and successfully marketed our services to area referral sources. Developed and implemented a comprehensive staff training program.

Offeror: Complete & Return this Form with Response Submission.
Senate Bill 252 Certification

SB 252 CHAPTER 2252 CERTIFICATION I, Alicia Barrera, Vice President, the undersigned representative of Deer Oaks EAP Services, LLC (Company or business name) being an adult over the age of eighteen (18) years of age, pursuant to Texas Government Code, Chapter 2252, Section 2252.152 and Section 2252.153, certify that the company named above is not listed on the website of the Comptroller of the State of Texas concerning the listing of companies that are identified under Section 806.051, Section 807.051 or Section 2253.153. I further certify that should the above-named company enter into a contract that is on said listing of companies on the website of the Comptroller of the State of Texas which do business with Iran, Sudan or any Foreign Terrorist Organization, I will immediately notify Mr. Jose Angel Lopez III, Webb County Purchasing Agent at (956) 523-4125 or via email at joel@webbcountytx.gov

Alicia Barrera, Vice President Name of Company Representative (Print)

Alicia Barrera Signature of Company Representative

9/12/2024 Date

CERTIFICATION
REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY
EXCLUSION FOR COVERED CONTRACTS

PART A.

Federal Executive Orders 12549 and 12689 require the Texas Department of Agriculture (TDA) to screen each covered potential contractor to determine whether each has a right to obtain a contract in accordance with federal regulations on debarment, suspension, ineligibility, and voluntary exclusion. Each covered contractor must also screen each of its covered subcontractors.

In this certification "contractor" refers to both contractor and subcontractor; "contract" refers to both contract and subcontract.

By signing and submitting this certification the potential contractor accepts the following terms:

1. The certification herein below is a material representation of fact upon which reliance was placed when this contract was entered into. If it is later determined that the potential contractor knowingly rendered an erroneous certification, in addition to other remedies available to the federal government, the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, or the TDA may pursue available remedies, including suspension and/or debarment.
2. The potential contractor will provide immediate written notice to the person to which this certification is submitted if at any time the potential contractor learns that the certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
3. The words "covered contract", "debarred", "suspended", "ineligible", "participant", "person", "principal", "proposal", and "voluntarily excluded", as used in this certification have meanings based upon materials in the Definitions and Coverage sections of federal rules implementing Executive Order 12549. Usage is as defined in the attachment.
4. The potential contractor agrees by submitting this certification that, should the proposed covered contract be entered into, it will not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, and/or the TDA, as applicable.

Do you have or do you anticipate having subcontractors under this proposed contract?

☒ Yes

☐ No

5. The potential contractor further agrees by submitting this certification that it will include this certification titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion for Covered Contracts" without modification, in all covered subcontracts and in solicitations for all covered subcontracts.
6. A contractor may rely upon a certification of a potential subcontractor that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered contract, unless it knows that the certification is erroneous. A contractor must, at a minimum, obtain certifications from its covered subcontractors upon each subcontract's initiation and upon each renewal.
7. Nothing contained in all the foregoing will be construed to require establishment of a system of records in order to render in good faith the certification required by this certification document. The knowledge and information of a contractor is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
8. Except for contracts authorized under paragraph 4 of these terms, if a contractor in a covered contract knowingly enters into a covered subcontract with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, Department of Health and Human Services, United States Department of Agriculture, or other federal department or agency, as applicable, and/or the TDA may pursue available remedies, including suspension and/or debarment.

**PART B. CERTIFICATION REGARDING DEBARMENT, SUSPENSION,
INELIGIBILITY AND VOLUNTARY EXCLUSION FOR COVERED CONTRACTS**

Indicate in the appropriate box which statement applies to the covered potential contractor:

- ☒ The potential contractor certifies, by submission of this certification, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this contract by any federal department or agency or by the State of Texas.
- ☐ The potential contractor is unable to certify to one or more of the terms in this certification. In this instance, the potential contractor must attach an explanation for each of the above terms to which he is unable to make certification. Attach the explanation(s) to this certification.

Name of Contractor	Vendor ID No. or Social Security No.	Program No.
Deer Oaks EAP Services, LLC	26-2031311	2024-11

Alicia Barrera
Signature of Authorized Representative

9/12/2024
Date

Alicia Barrera, Vice President
Printed/Typed Name and Title of
Authorized Representative

CERTIFICATION REGARDING FEDERAL LOBBYING
(Certification for Contracts, Grants, Loans, and Cooperative Agreements)

PART A. PREAMBLE

Federal legislation, Section 319 of Public Law 101-121 generally prohibits entities from using federally appropriated funds to lobby the executive or legislative branches of the federal government. Section 319 specifically requires disclosure of certain lobbying activities. A federal government-wide rule, "New Restrictions on Lobbying", published in the Federal Register, February 26, 1990, requires certification and disclosure in specific instances.

PART B. CERTIFICATION

This certification applies only to the instant federal action for which the certification is being obtained and is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federally appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with these federally funded contract, subcontract, subgrant, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions. (If needed, contact the Texas Department of Agriculture to obtain a copy of Standard Form-LLL.)

3. The undersigned shall require that the language of this certification be included in the award documents for all covered subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all covered subrecipients will certify and disclose accordingly.

Do you have or do you anticipate having covered subawards under this transaction?

☒ Yes

☐ No

Name of Contractor/Potential Contractor	Vendor ID No. or Social Security No.	Program No.
Deer Oaks EAP Services, LLC	26-2031311	2024-11

Name of Authorized Representative	Title
Alicia Barrera	Vice President

Alicia Barrera
Signature – Authorized Representative

9/12/2024
Date

**WEBB COUNTY PURCHASING DEPT.
QUALIFIED PARTICIPATING VENDOR CODE OF ETHICS
AFFIDAVIT FORM**

STATE OF TEXAS *

KNOW ALL MEN BY THESE PRESENTS:

COUNTY OF WEBB *

BEFORE ME the undersigned Notary Public, appeared Alicia Barrera, Vice President, the herein-named "Affiant", who is a resident of Bexar County, State of Texas, and upon his/her respective oath, either individually and/or behalf of their respective company/entity, do hereby state that I have personal knowledge of the following facts, statements, matters, and/or other matters set forth herein are true and correct to the best of my knowledge.

I personally, and/or in my respective authority/capacity on behalf of my company/entity do hereby confirm that I have reviewed and agree to fully comply with all the terms, duties, ethical policy obligations and/or conditions as required to be a qualified participating vendor with Webb County, Texas as set forth in the Webb County Purchasing Code of Ethics Policy posted at the following address: <http://www.webbcountytexas.gov/PurchasingAgent/PurchasingEthicsPolicy.pdf>

I personally, and/or in my respective authority/capacity on behalf of my company/entity do hereby further acknowledge, agree and understand that as a participating vendor with Webb County, Texas on any active solicitation/proposal/qualification that I and/or my company/entity failure to comply with the Code of Ethics policy may result in my and/or my company/entity disqualification, debarment or make void my contract awarded to me, my company/entity by Webb County. I agree to communicate with the Purchasing Agent or his designees should I have questions or concerns regarding this policy to ensure full compliance by contacting the Webb County Purchasing Dept. via telephone at (956) 523-4125 or e-mail to the Webb County Purchasing Agent to joel@webbcountytexas.gov.

Executed and dated this 10 day of September, 2024.

Alicia Barrera
Signature of Affiant

Alicia Barrera, Vice President, Deer Oaks EAP Services
Printed Name of Affiant/Company/Entity

SWORN to and subscribed before me, this 10th day September, 2024



Olivia Marie Jackson
NOTARY PUBLIC, STATE OF TEXAS

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

Deer Oaks EAP Services, LLC

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

None, N/A

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐

Yes

☐

No

None, N/A

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐

Yes

☐

No

None, N/A

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

None, N/A

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7 Alicia Barrera

Signature of vendor doing business with the governmental entity

9/12/2024

Date

Offeror: Complete & Return this Form with Response Submission.

House Bill 89 Verification

I, Alicia Barrera, Vice President, the undersigned representative of (company or business name) Deer Oaks EAP Services, LLC

(heretofore referred to as company) being an adult over the age of eighteen (18) years of age, after being duly sworn by the undersigned notary, do hereby depose and verify under oath that the company named above, under the provisions of Subtitle F, Title 10, Government Code Chapter 2270:

1. Does not boycott Israel currently; and
2. Will not boycott Israel during the term of the contract.

Pursuant to Section 2270.001, Texas Government Code:

1. "Boycott Israel" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made ordinary business purposes; and

2. "Company" means a for-profit sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or an limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate of those entities or business association that exist to make a profit.

Alicia Barrera

Signature of Company Representative

9/10/2024

Date

On this 10th day of September, 2024, personally appeared

Alicia Barrera

, the above named person, who after by me being duly sworn, did swear and confirm that the above is true and correct.

Notary Seal

Olivia Marie Jackson

Notary Signature

September 10, 2024

Date



PROOF OF NO DELINQUENT TAXES OWED TO WEBB COUNTY

Name Alicia Barrera, Vice President owes no delinquent property taxes to Webb County.

Deer Oaks EAP Services, LLC owes no property taxes as a business in Webb County.
(Business Name)

Paul Alan Boskind, Ph.D, Owner owes no property taxes as a resident of Webb County.
(Business Owner)

Alicia Barrera

Person who can attest to the above information

*** SIGNED NOTORIZED DOCUMENT AND PROOF OF NO DELINQUENT TAXES TO WEBB COUNTY.**

The State of Texas

County of Webb

Before me, a Notary Public, on this day personally appeared Alicia Barrera, know to me (or proved to me on the oath of _____) to be the person whose name is subscribed to the forgoing instrument and acknowledged to me that he executed the same for the purpose and consideration therein expressed.

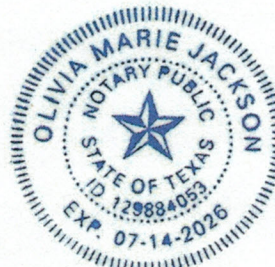
Given under my hand and seal of office this 10th day of September 2024.

Notary Public, State of Texas

Olivia Marie Jackson

(Print name of Notary Public here)

My commission expires the 14th day of July 2024



References Form

Please list at minimum five (5) local governmental entities where similar scope of services were provided.

THIS FORM MUST BE RETURNED WITH YOUR OFFER.

REFERENCE ONE

Government/Company Name: Travis County, TX

Address: 1010 Lavaca St., Suite 420, Austin, TX 78701

Contact Person and Title: Zephyr Stone, SHRM-CP, PHR, Manager, Talent Planning & Engagement

Phone: 512-854-6044 Fax: 512-854-4203

Email Address: Zephyr.Stone@traviscountytexas.gov Contract Period: 12/1/2014 - Present

Description of Goods / Services Provided: Comprehensive EAP + Work-Life Program including
a 5-session counseling model.

REFERENCE TWO

Government/Company Name: Hays County, TX

Address: 712 South Stagecoach Trail, Suite 1063, San Marcos, TX 78666

Contact Person and Title: Shari Miller, HR Director

Phone: (512) 393-2245 Fax: N/A

Email Address: shari.miller@co.hays.tx.us Contract Period: 8/1/2019 - Present

Description of Goods / Services Provided: Comprehensive EAP + Work-Life Program including
a 6-session counseling model.

REFERENCE THREE

Government/Company Name: Cameron County, TX

Address: 1100 E Monroe St., Brownsville, TX 78520

Contact Person and Title: Susie Marfileno, Assistant HR Director

Phone: (956) 544-0827 Fax: N/A

Email Address: smarfileno@co.cameron.tx.us Contract Period: 10/1/2014 - Present

Description of Goods / Services Provided: Comprehensive EAP + Work-Life program including
a 6-session counseling model.

REFERENCE Four

Government/Company Name: McLennan County, TX

Address: 214 N. 4th Street, Suite 200, Waco, Texas 76701

Contact Person and Title: Stacy Vega, Human Resources Benefits Manager

Phone: (254)757-5158 Fax: (254)757-5073

Email Address: stacy.vega@mclennan.gov Contract Period: 10/1/2015 - Present

Description of Goods / Services Provided: Comprehensive EAP!+ Work-Life program including
a 5-session counseling model.

REFERENCE Five

Government/Company Name: _____

Address: _____

Contact Person and Title: _____

Phone: _____ Fax: _____

Email Address: _____ Contract Period: _____

Description of Goods / Services Provided: _____

- **Additional pages are permitted if more space is required**

Space intentionally left Blank



Select Time Period

Date Range

1/1/2021

3/15/2022

Select Organization

Reseller/Company

All

Standard Region

All

Company/Region

All

Company/Country/Division

All

Disruptive Events

No

YES

Select Disruptive Event

All

Clear Filter

Please Select Organization

RESULTS FOR REPORTING PERIOD: 01 Jan 2021 To 15 Mar 2022

EXECUTIVE SUMMARY:

Standard Region:

Region:

Division:

TOTALS	Current Period	Same Period Last Year	Change From Last Period
Cases:	29633	26658	2975
Lives Covered:	499,860	436,288	63,572
Participants:	20,316	17,518	2,798

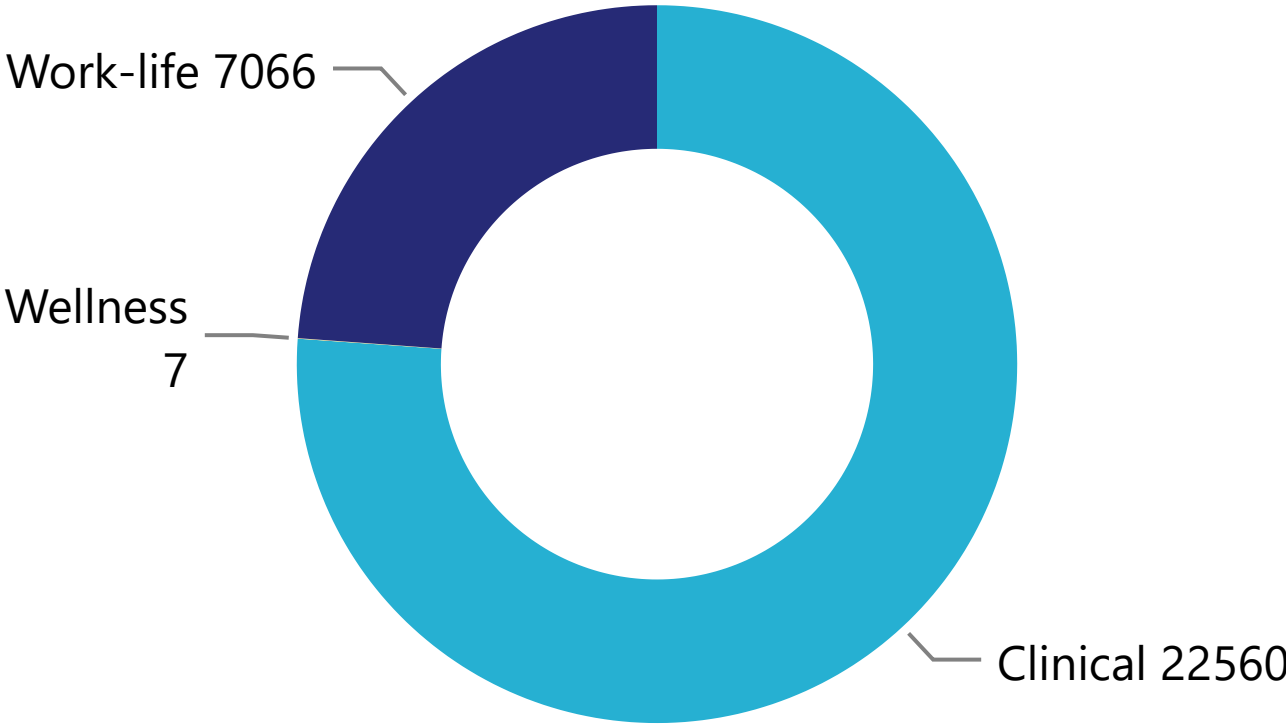
UTILIZATION	Current Period	Same Period Last Year	Change From Last Period
Utilization:	6.07%	6.22%	-0.15%
Clinical:	4.51%	4.66%	-0.15%
Work-Life:	1.56%	1.56%	-0.01%
Wellness:	0.00%	0.00%	0.00%

OBJECTIVE:
Client dashboard shows interactive way to visualize organization's well-being measures. Data driven statistics and visuals help to understand various issues ranging from dependent care and stress management to clinical service and wellness programs.

YOUR ACCOUNT MANAGER :
If you have any questions, concerns, or would like to discuss customized strategies to maximize program utilization, please reach out to your Account Manager:

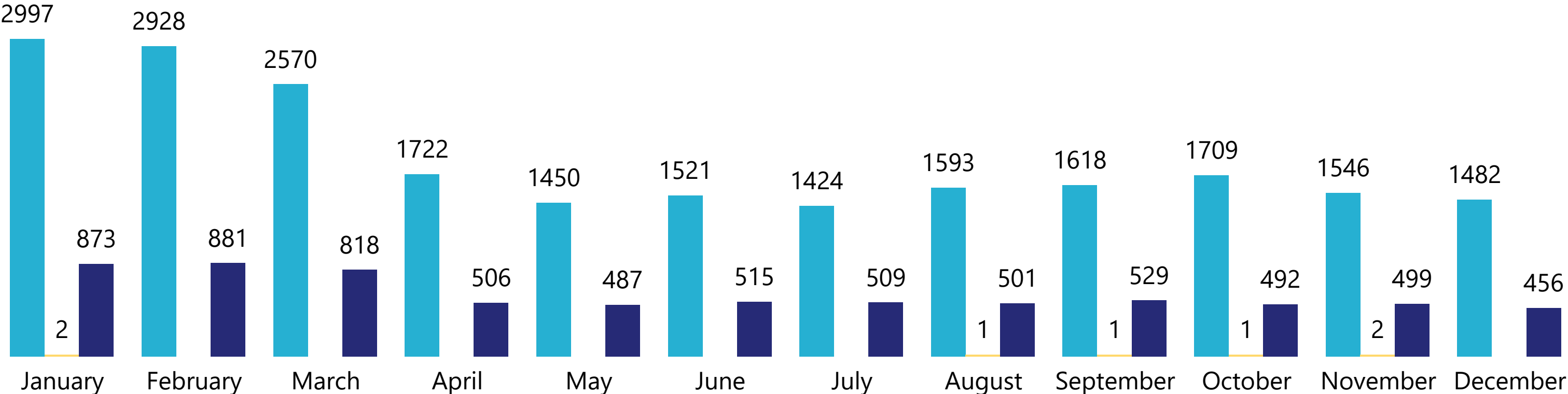
Next →

Service Type Distribution

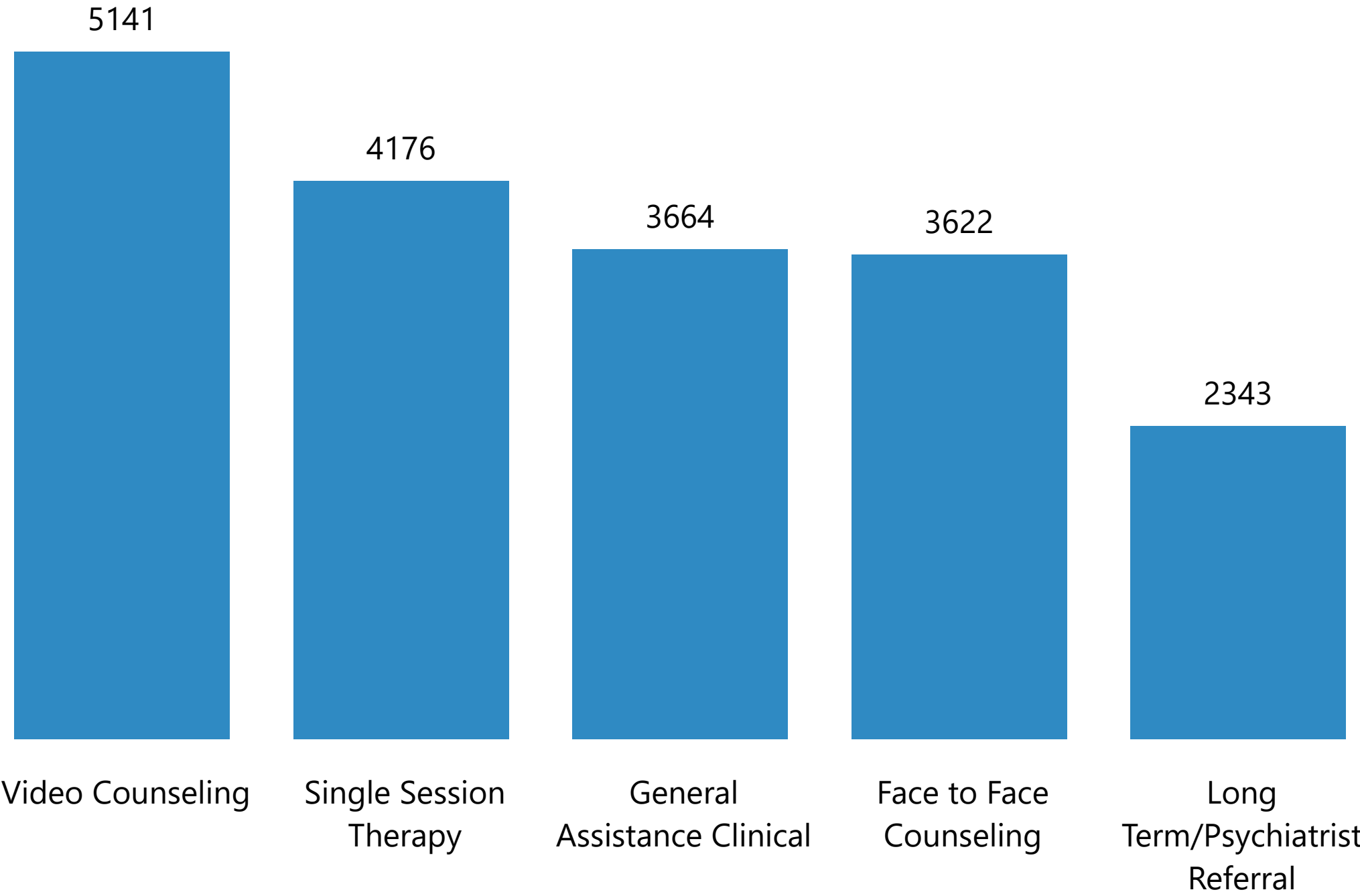


Monthly Case Trend

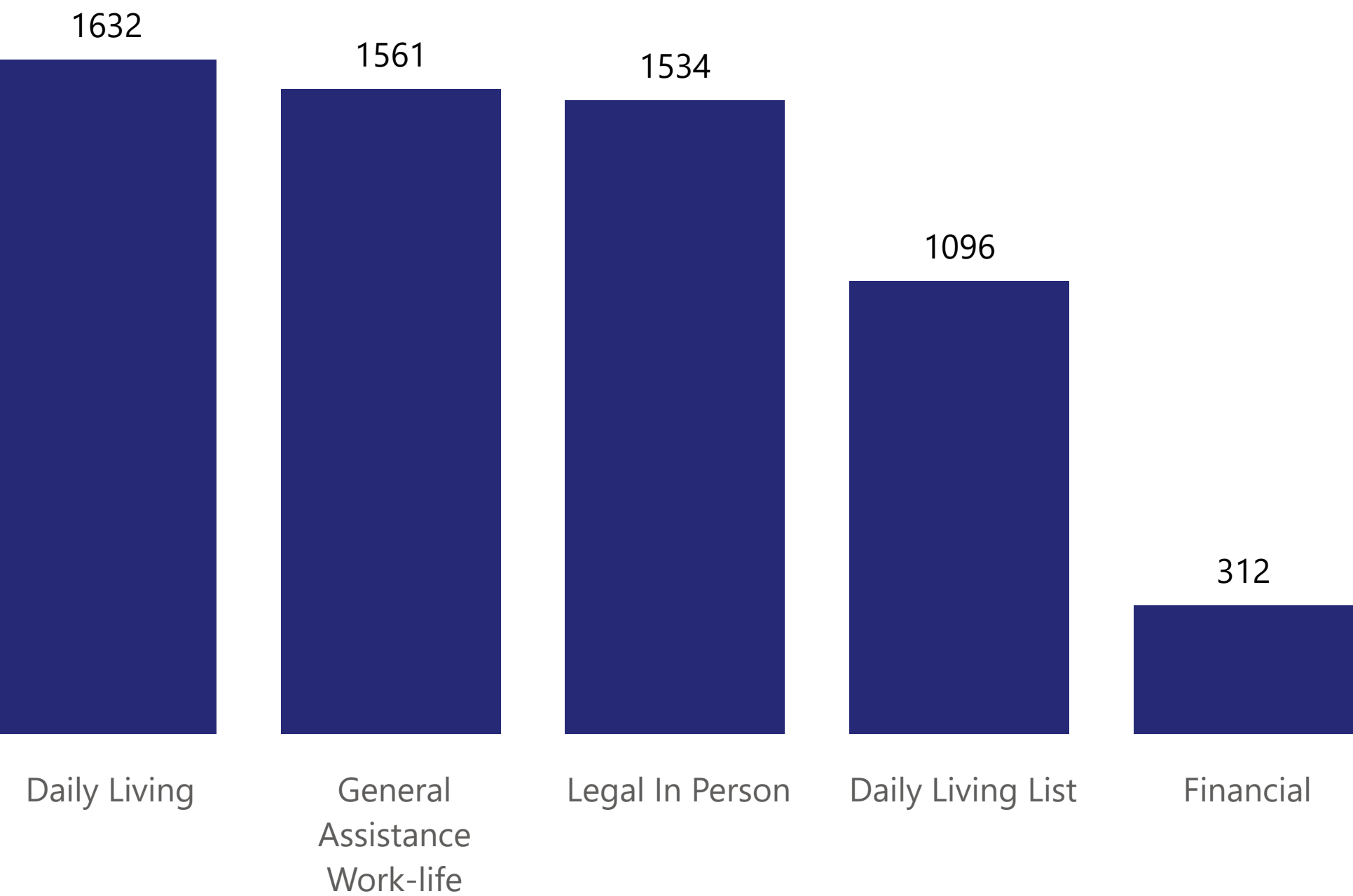
Clinical Wellness Work-life



Top 5 Clinical Services

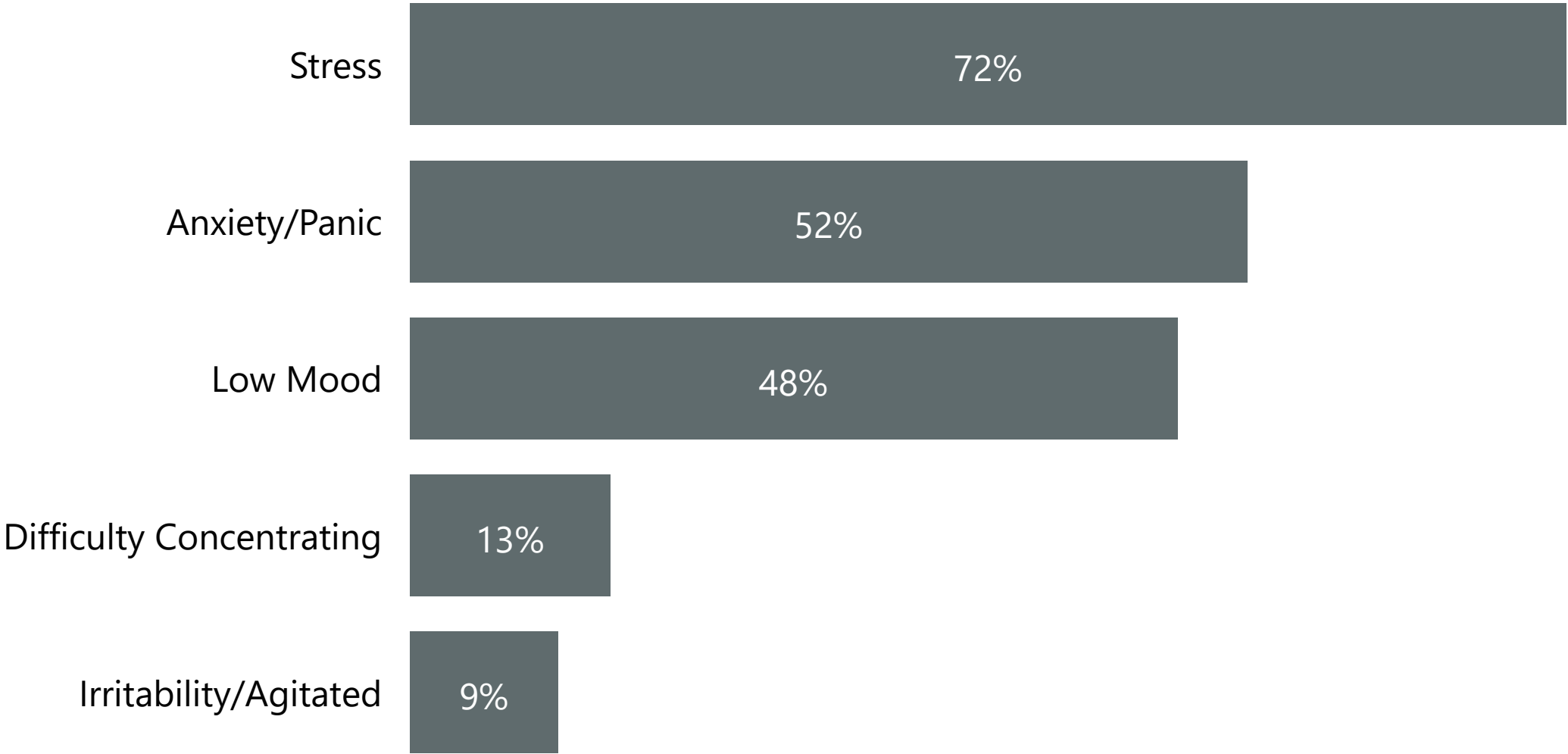


Top 5 Work-life Services

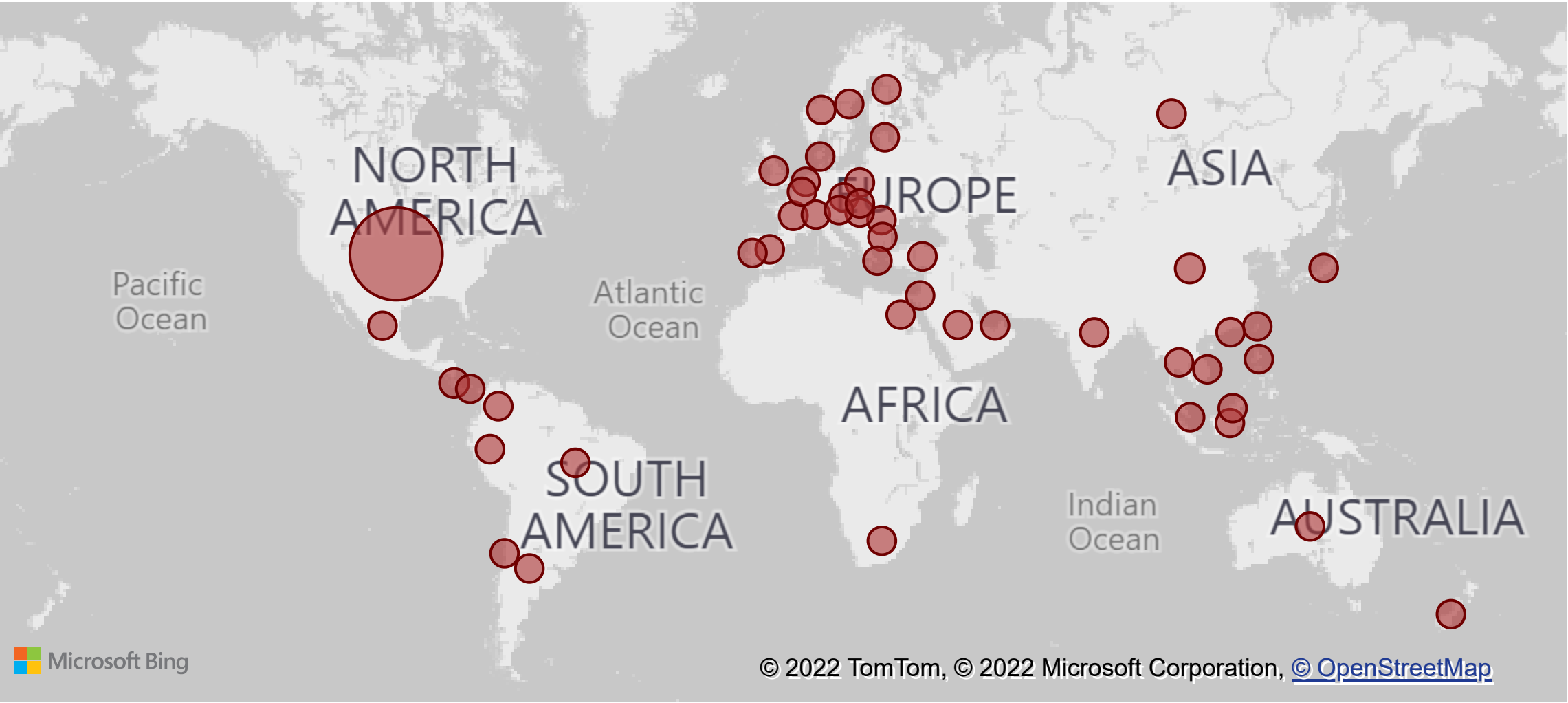




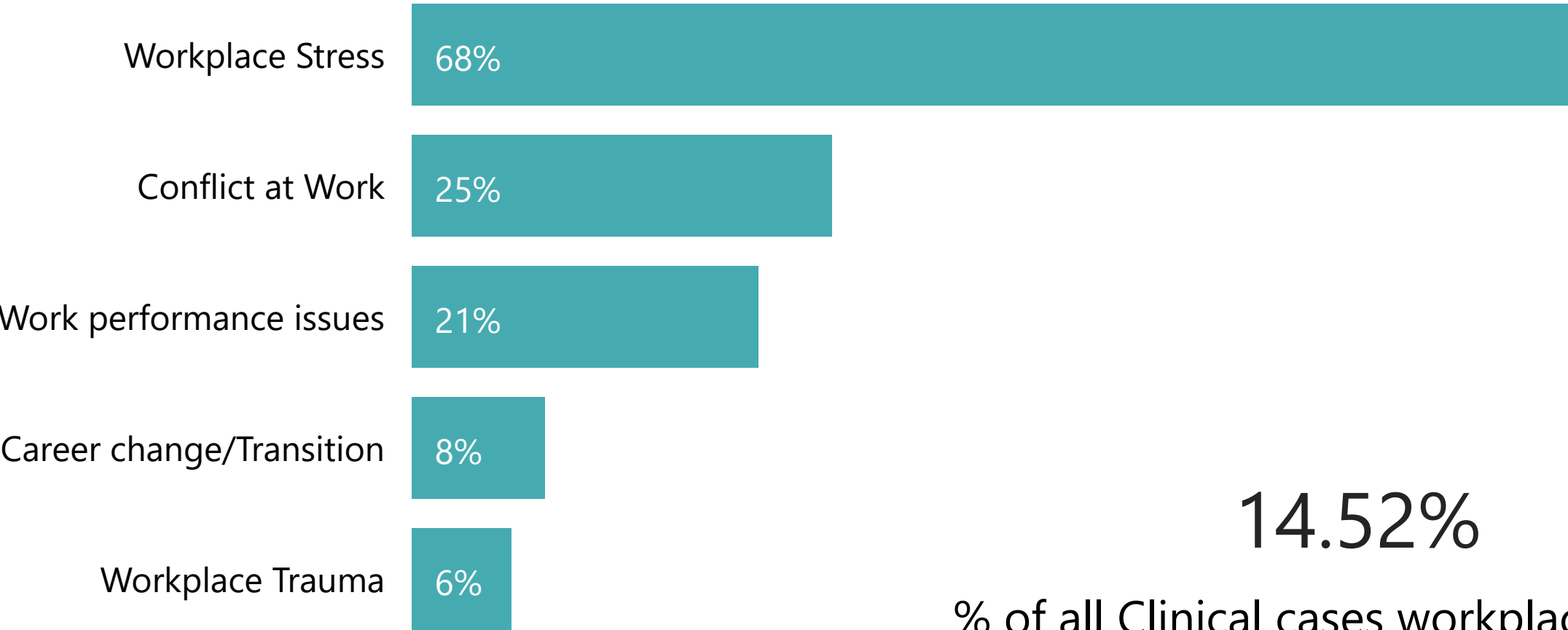
Top 5 Clinical Personal Concerns



Case Distribution by Entity (Entities with > 100 Lives)

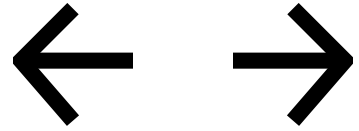
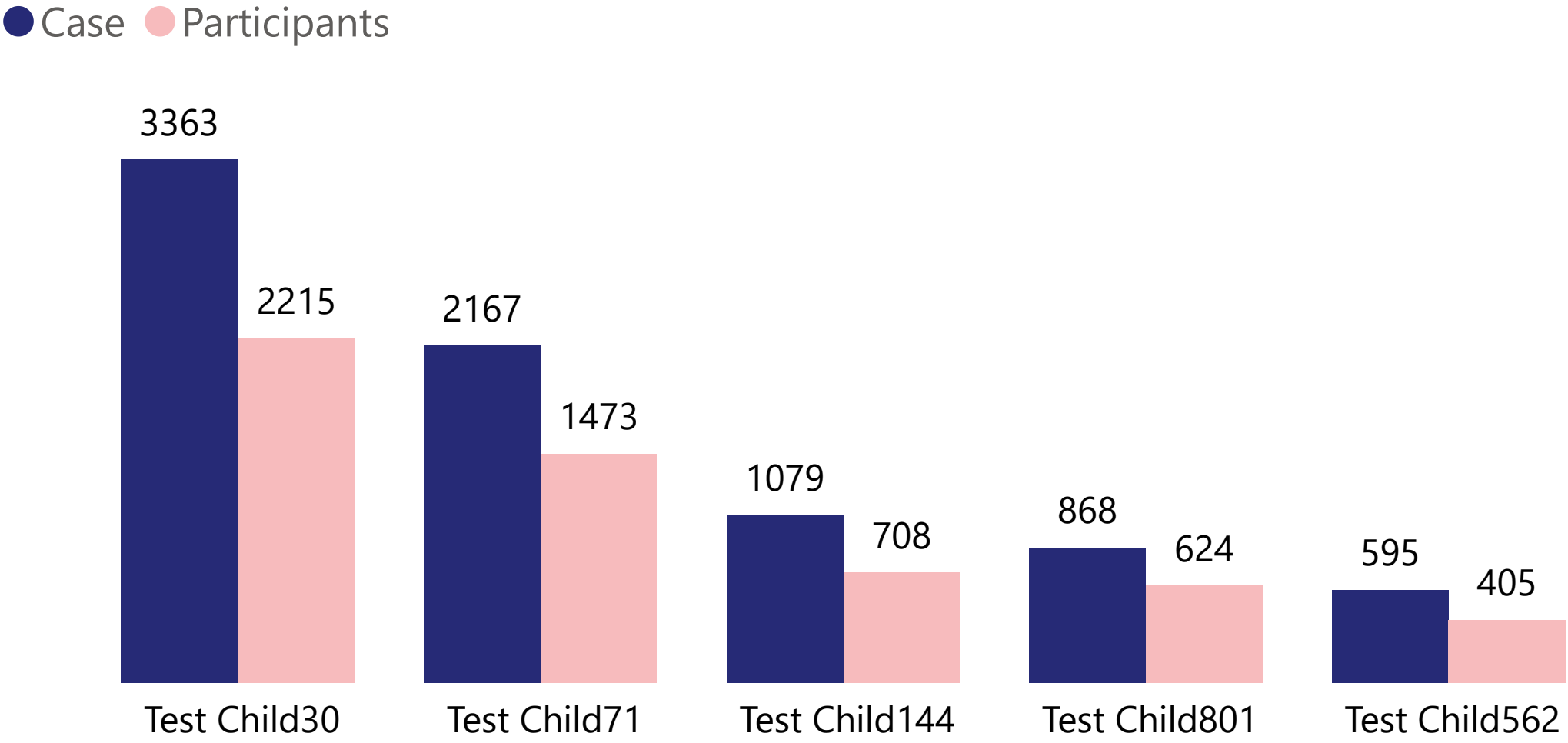


Top 5 Clinical Workplace Concerns



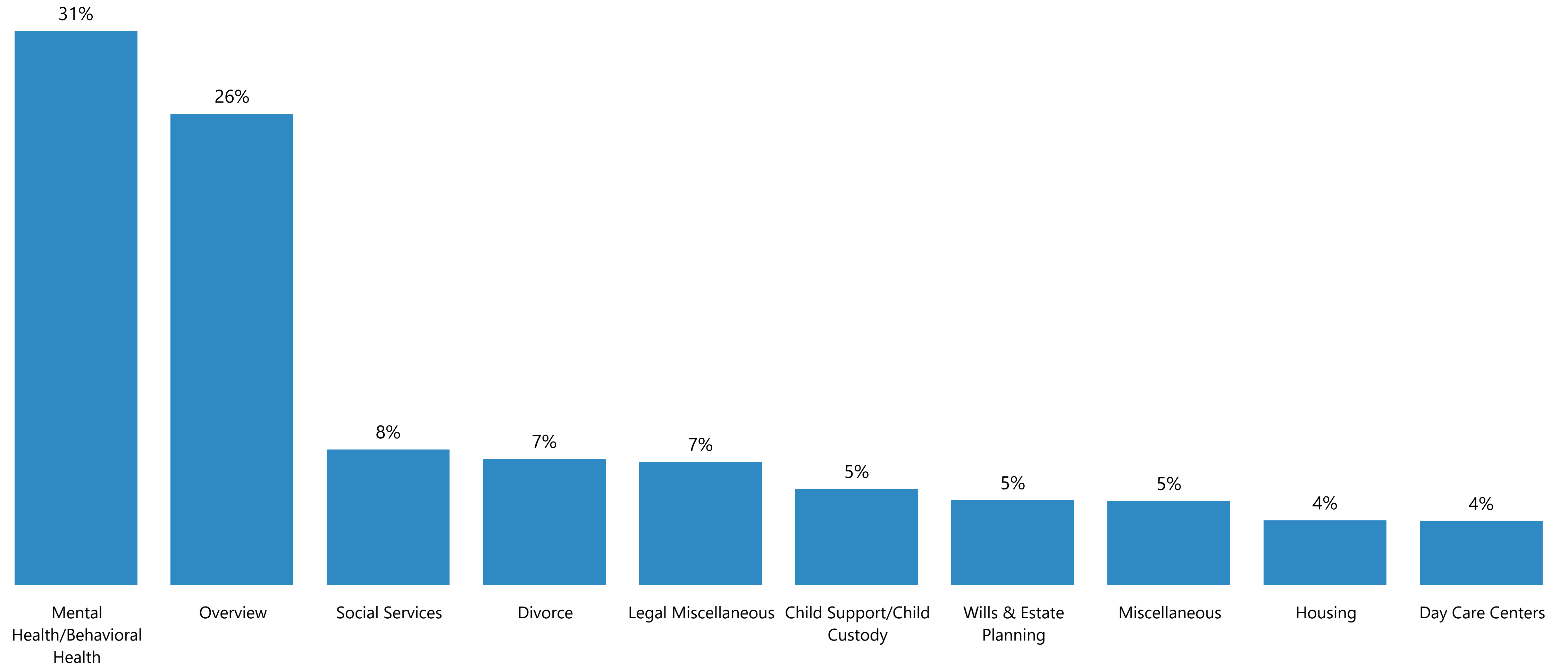
14.52%
% of all Clinical cases workplace related

Top 5 Companies (Only visible for > 100 Lives)





Top 10 Presenting Issues - WorkLife



Reporting Period: 01 Jan 2021 To 15 Mar 2022 || Company Name:



Demographic view with Benchmark Comparison

(select your benchmark)→

Company Size

All

Industry

All

Country

All

ⓘ

🏠

Top 5 Clinical Personal Concerns

● Your Entity

● Benchmark

Stress	72%	68%
Anxiety/Panic	52%	53%
Low Mood	48%	48%
Difficulty Concentrat...	13%	13%
Low Self-Esteem	9%	12%

Top 5 Clinical Workplace Concerns

● Your Entity

● Benchmark

Workplace Stress	68%	63%
Conflict at Work	25%	25%
Work performance is...	21%	23%
Career change/Trans...	8%	10%
Workplace Trauma	6%	4%

Cases by Relation - Your Entity

● Dependent

● Employee

● Family Member

● Manager

● Significant Other

● Student

Dependent	89%
Employee	3%
Family Member	3%
Manager	3%
Significant Other	3%
Student	3%

Cases by Relation - Benchmark

● Employee

● Family Member

● Manager

● Significant Other

● Dependent

● Student

Employee	92%
Family Member	3%
Manager	1%
Significant Other	1%
Dependent	1%
Student	1%

Cases by Age Group - Your Entity

● 18-30

● 31-40

● 41-50

● 51-60

● 61-70

● Undisclosed

18-30	14%
31-40	24%
41-50	24%
51-60	18%
61-70	6%
Undisclosed	13%

Cases by Age Group - Benchmark

● Undisclosed

● 31-40

● 41-50

● 18-30

● 51-60

● 61-70

Undisclosed	31%
31-40	20%
41-50	17%
18-30	14%
51-60	13%
61-70	5%

Cases by Gender - Your Entity

● Female

● Male

● Undisclosed

Female	70%
Male	27%
Undisclosed	3%

Cases by Gender - Benchmark

● Female

● Male

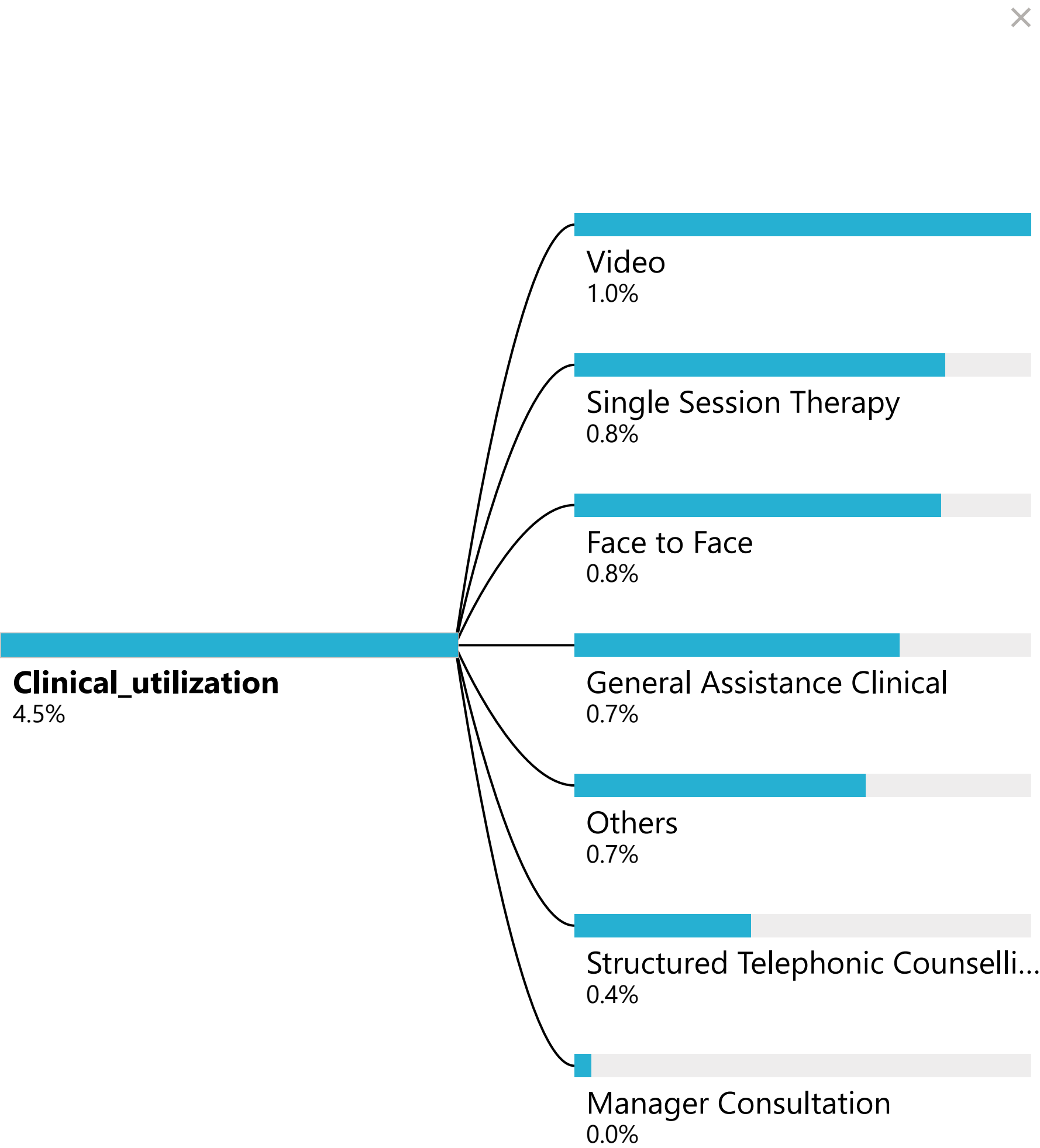
● Undisclosed

Female	63%
Male	31%
Undisclosed	6%

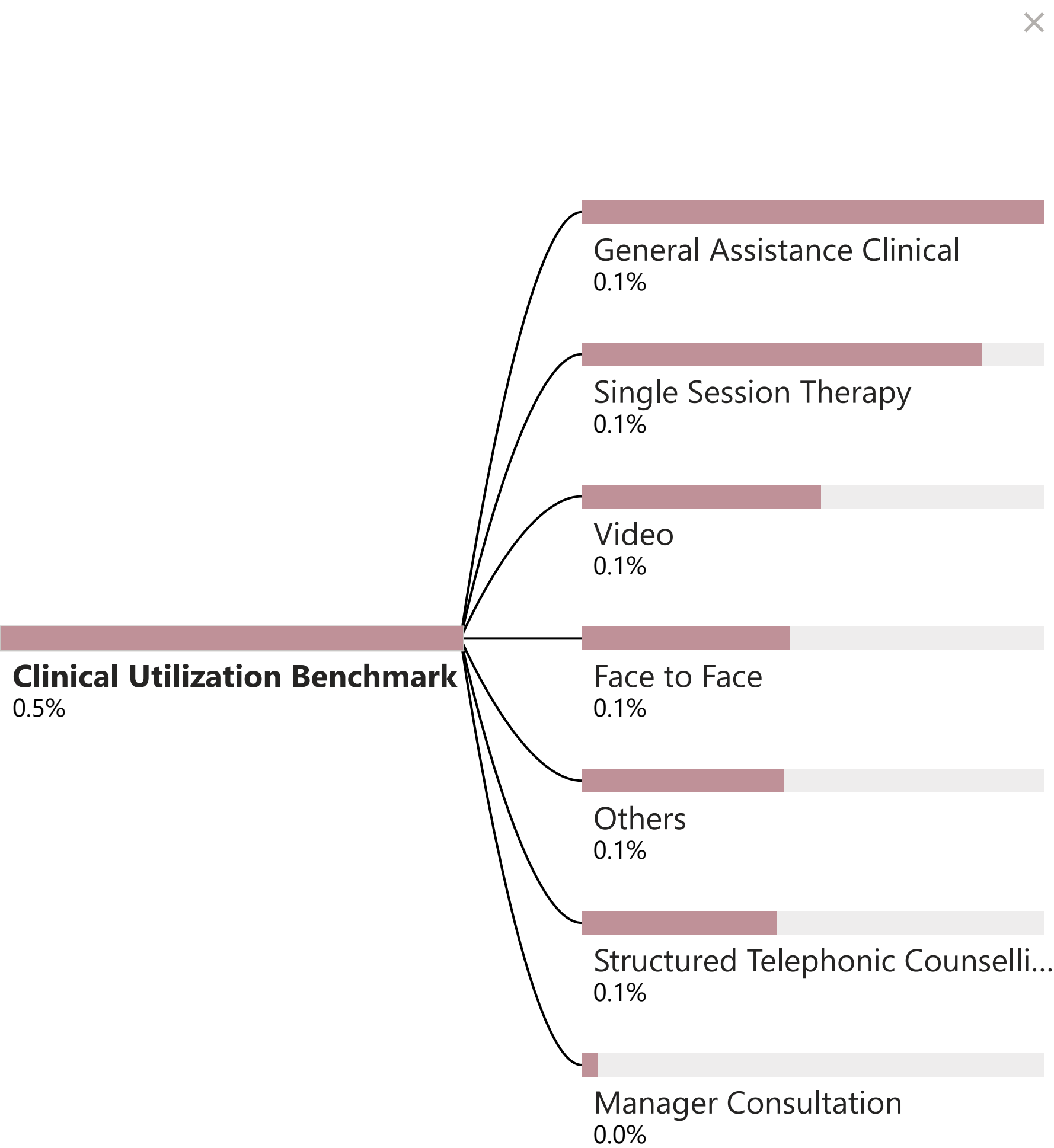
Reporting Period: 01 Jan 2021 To 15 Mar 2022 || Company Name:

← →

Clinical Utilization - Your Entity



Clinical Utilization - Benchmark



Company Size

All

Industry

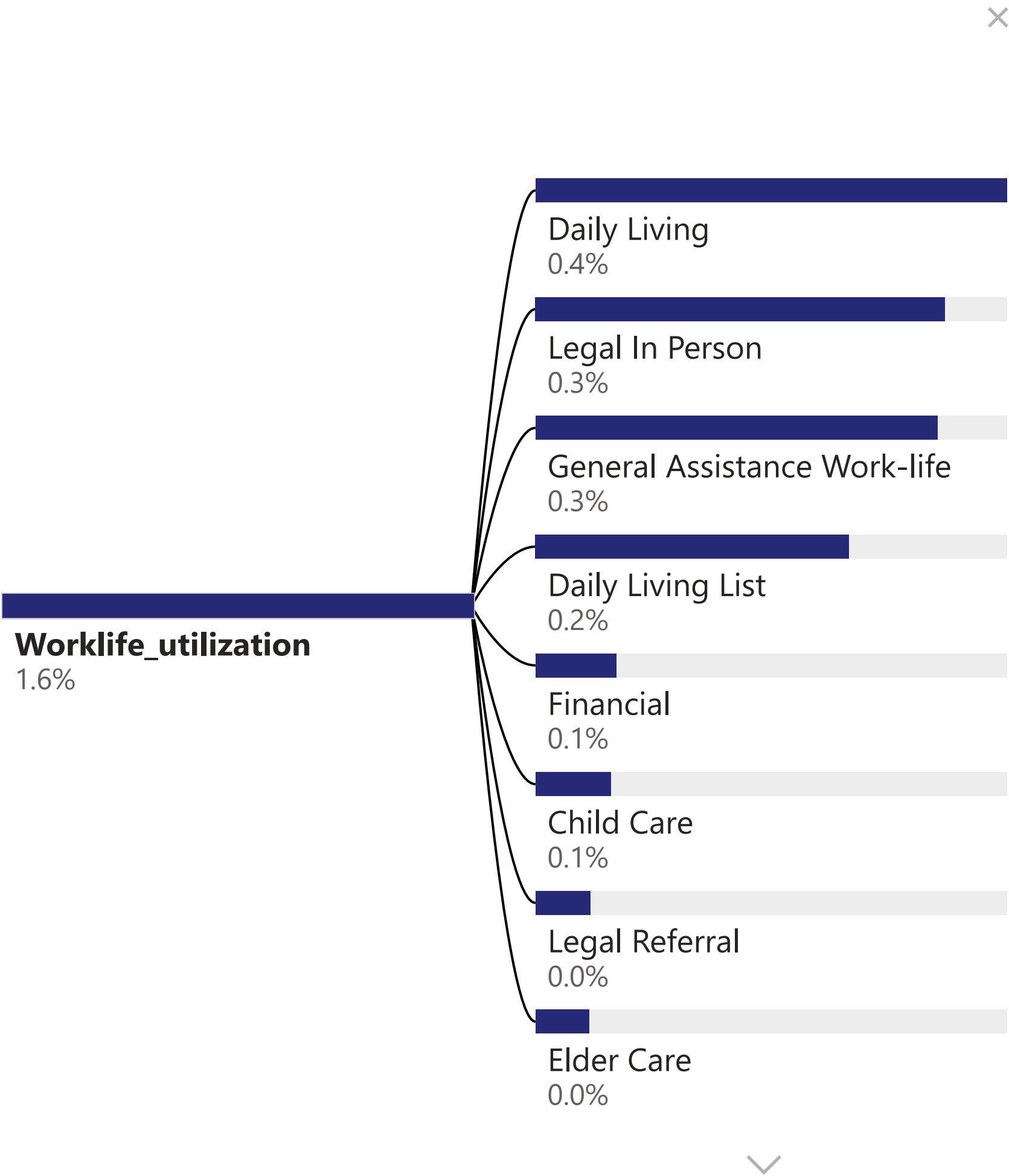
All

Country

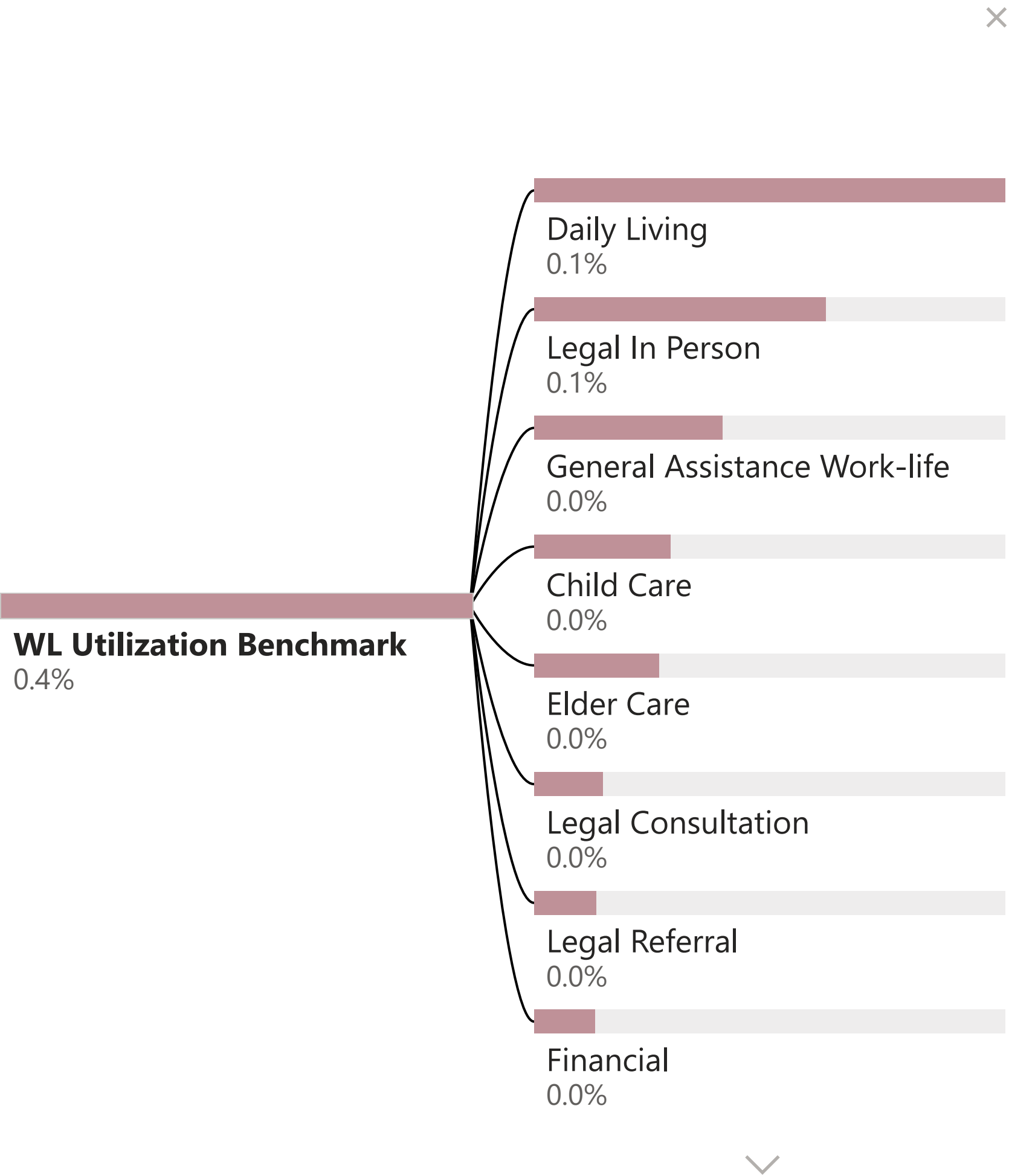
All



Work-life Utilization - Your Entity



Work-life Utilization - Benchmark

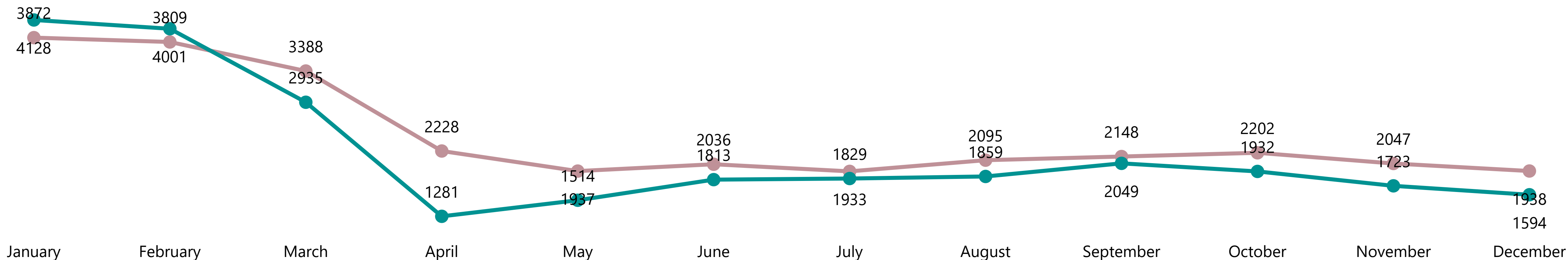


Year Over Year Comparison - Cases/Participants



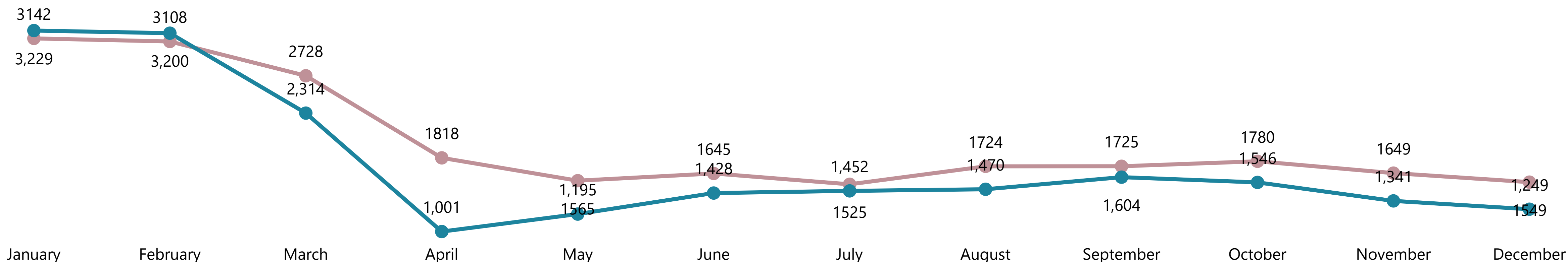
Case Trend

Current Period Same Period Last Year

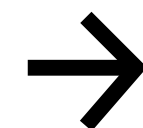
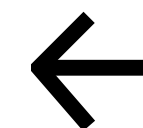


Participant Trend

Current Period Same Period Last Year



Reporting Period: 01 Jan 2021 To 15 Mar 2022 || Company Name:

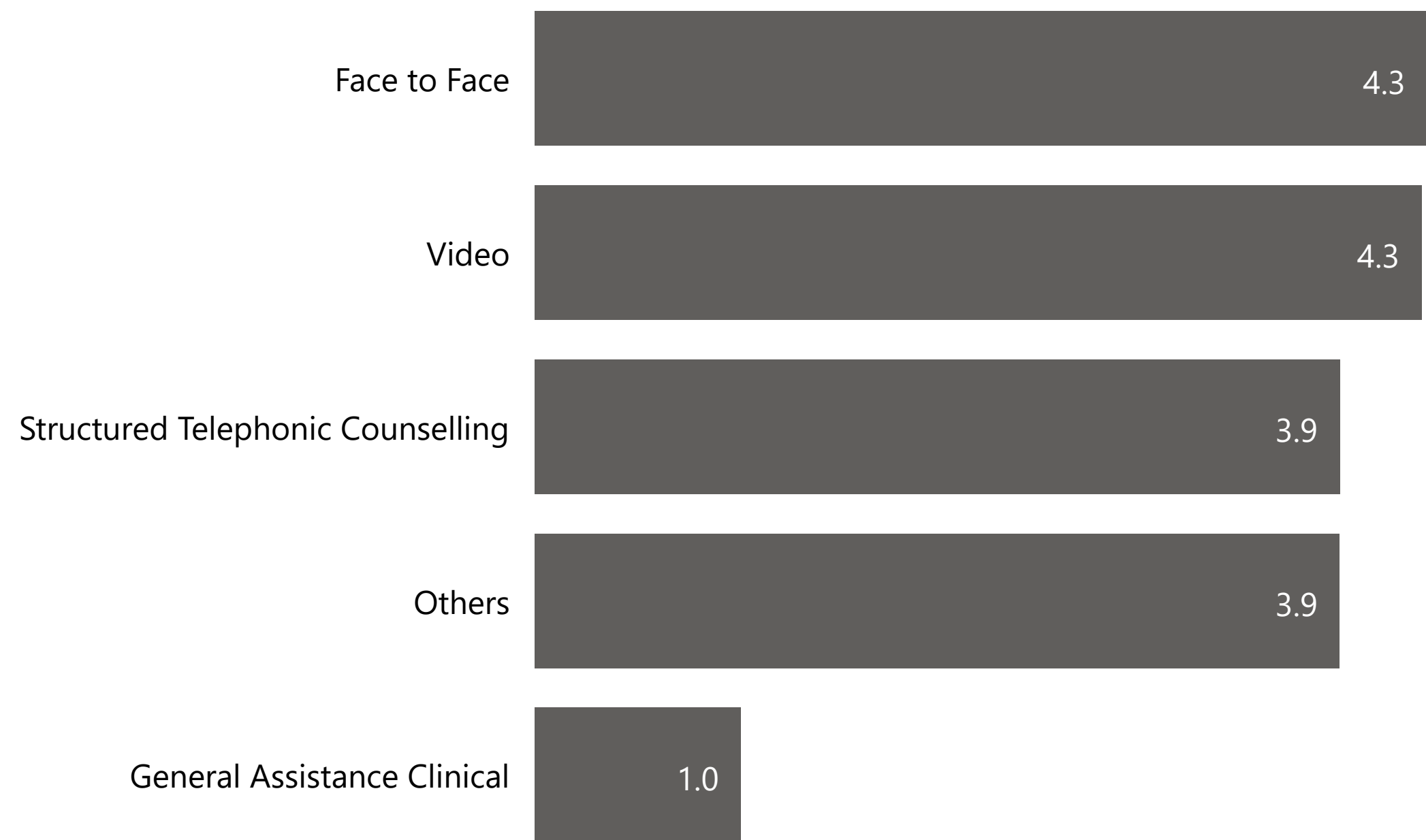


Current Trend

Average Sessions per case

4.2

Average Sessions by Services

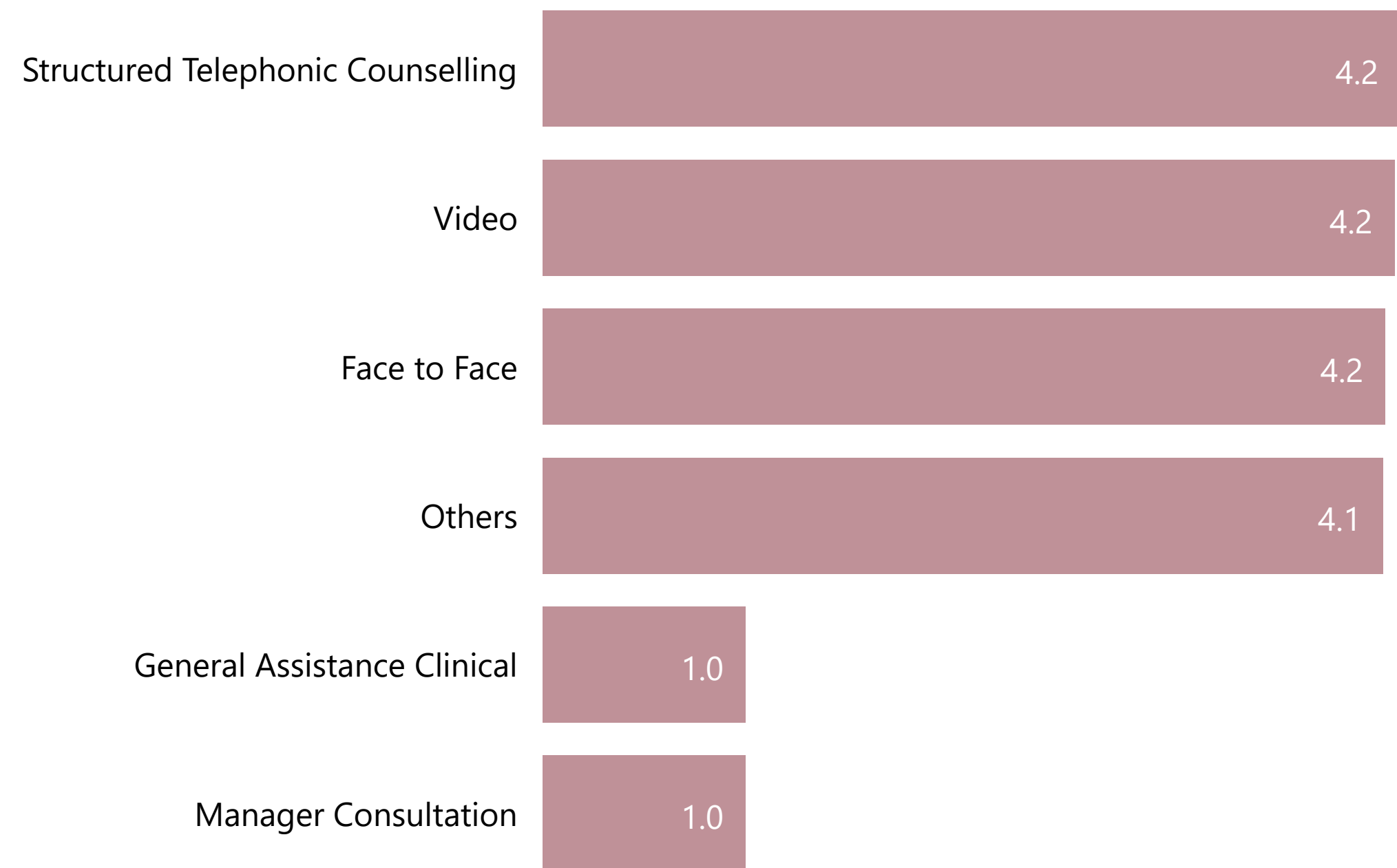


Same Period Last Year Trend

Average Sessions per case

4.2

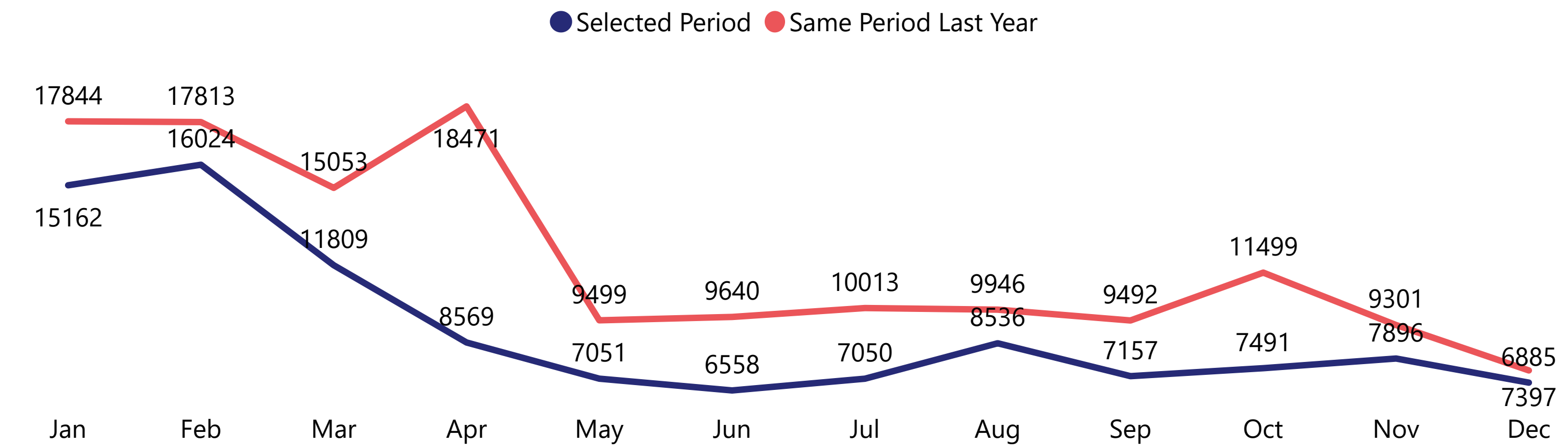
Average Sessions by Services



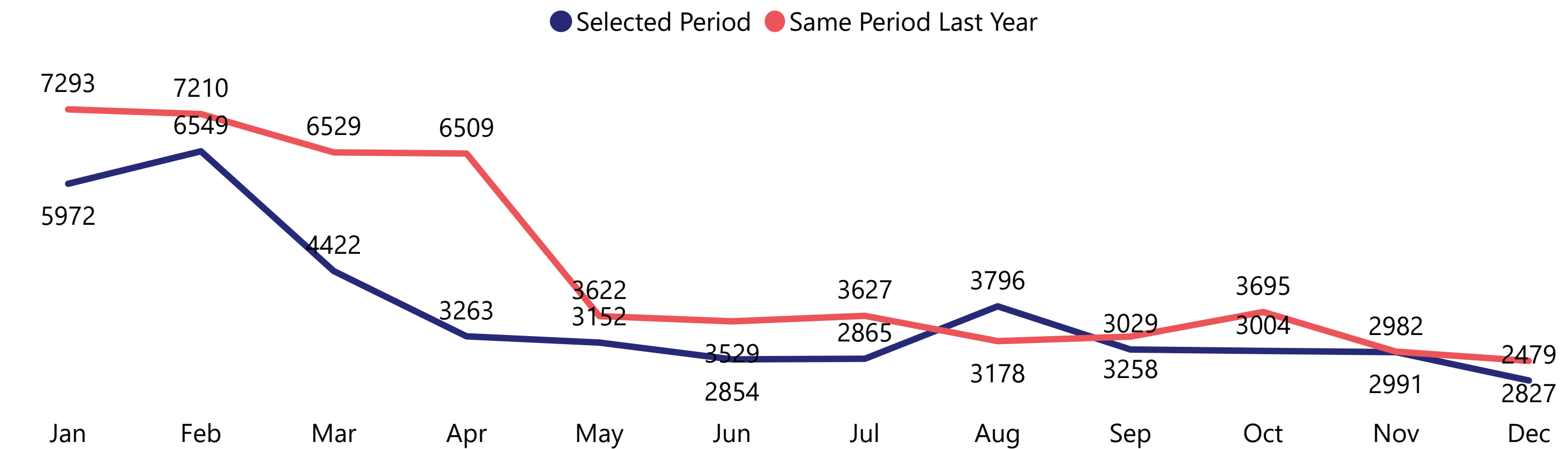
* Others include services like cCBT, Pathways, Aware etc



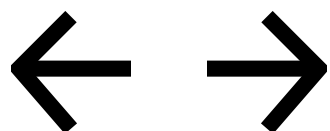
Webhits Trend



Web logins Trend

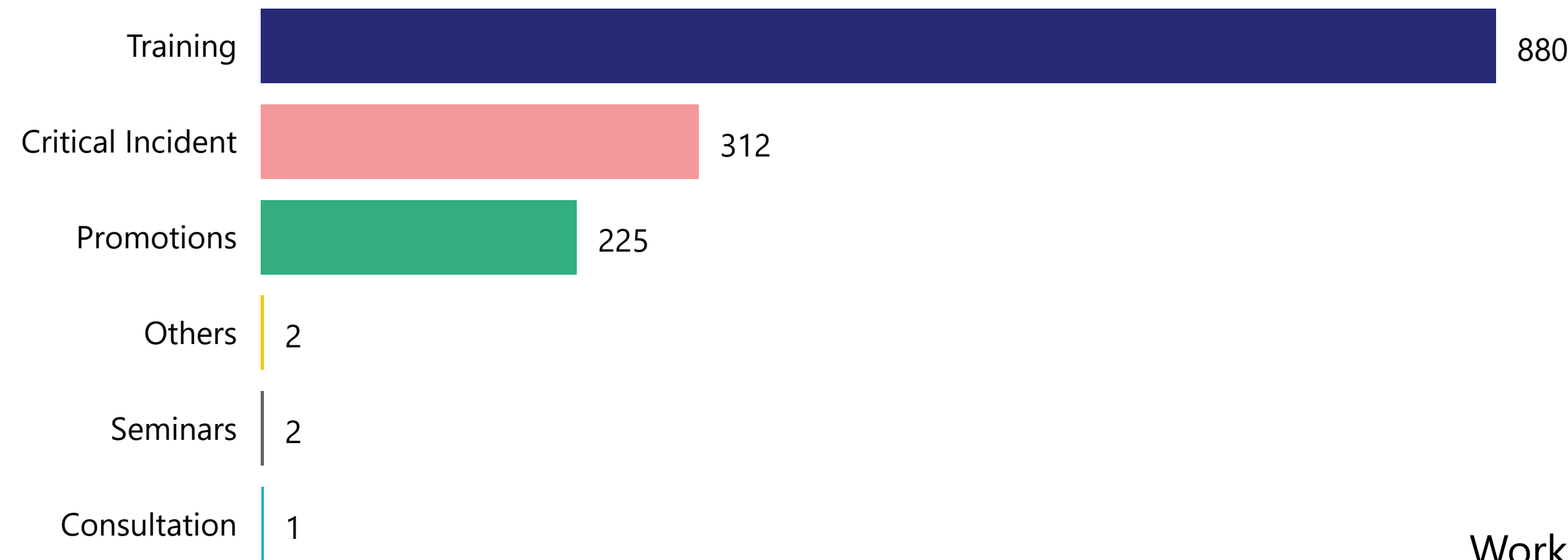


Webhits by Module

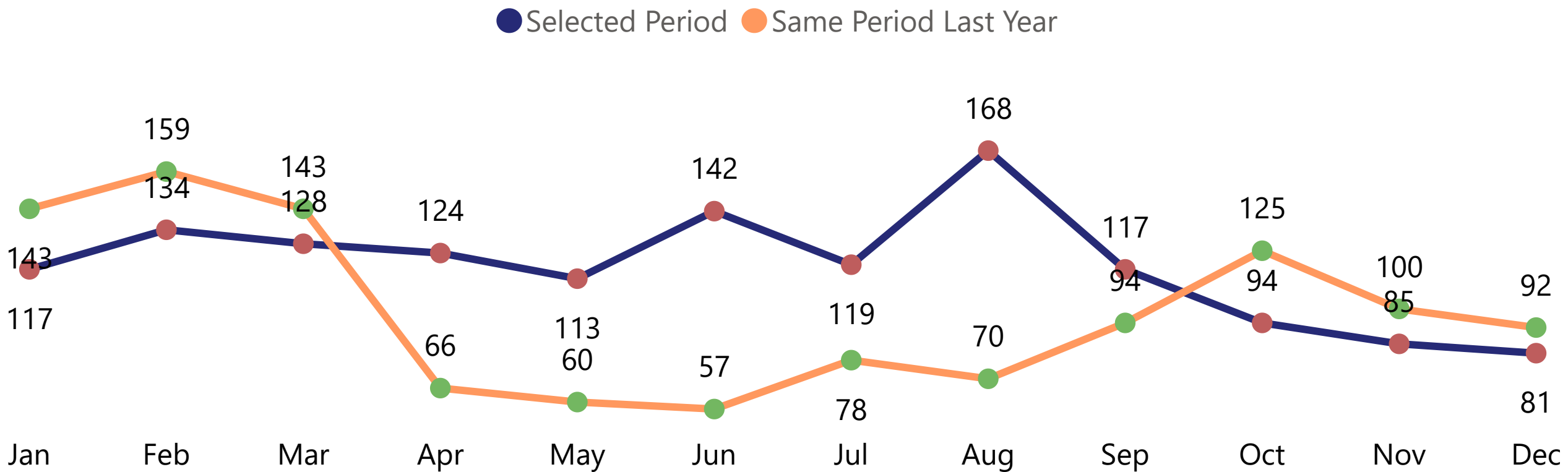




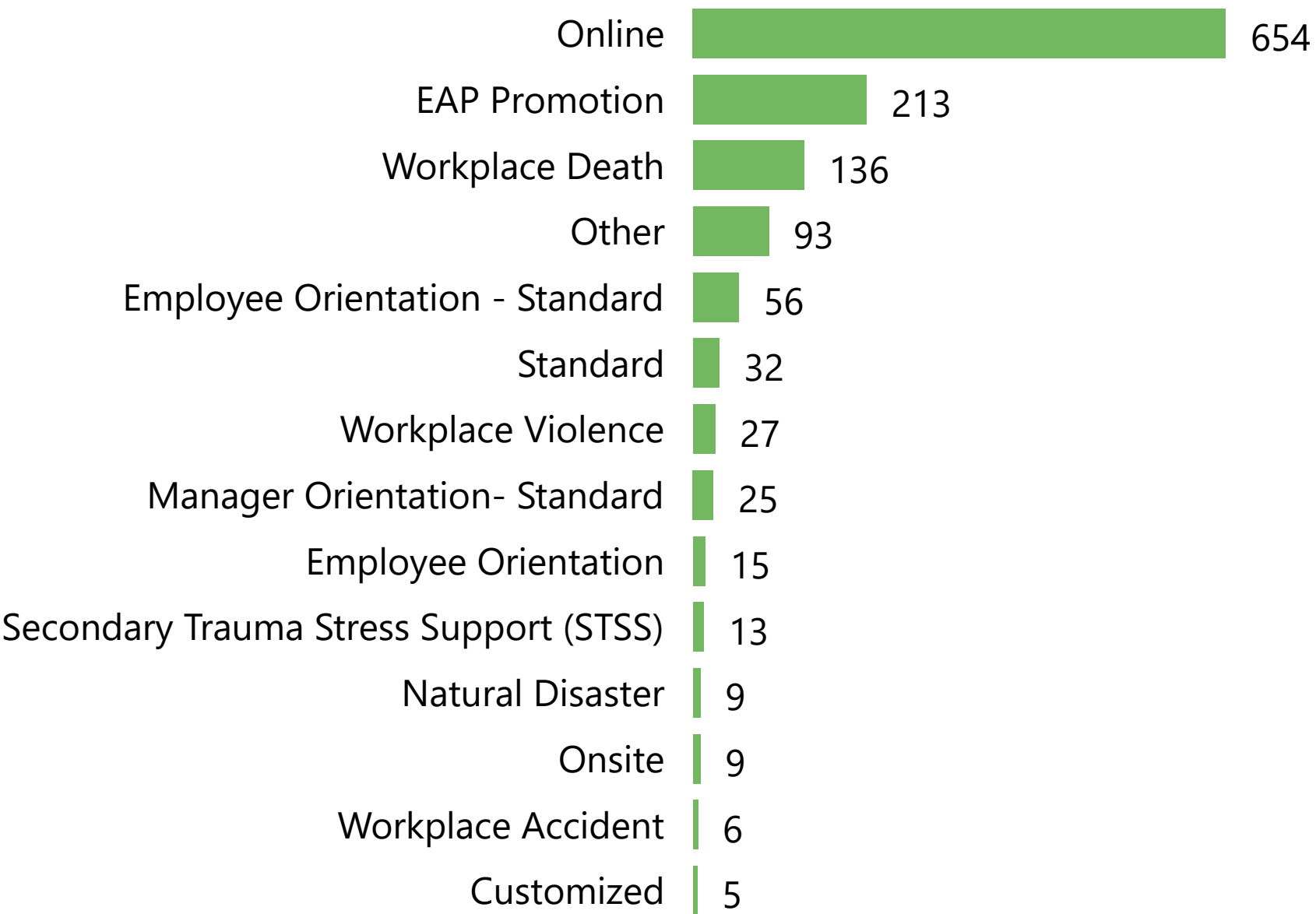
Distribution Of Workplace Activities



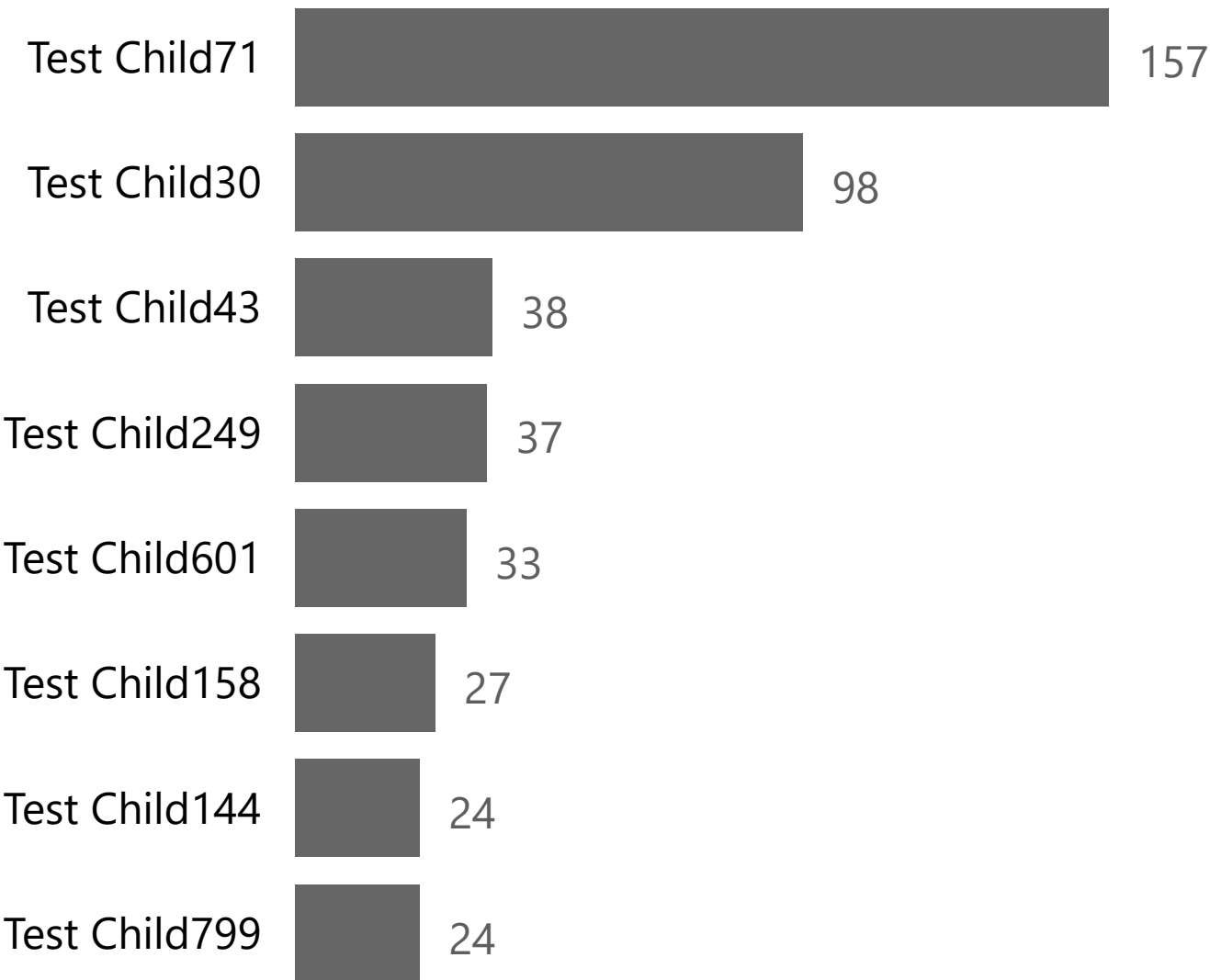
Workplace Activities Trend



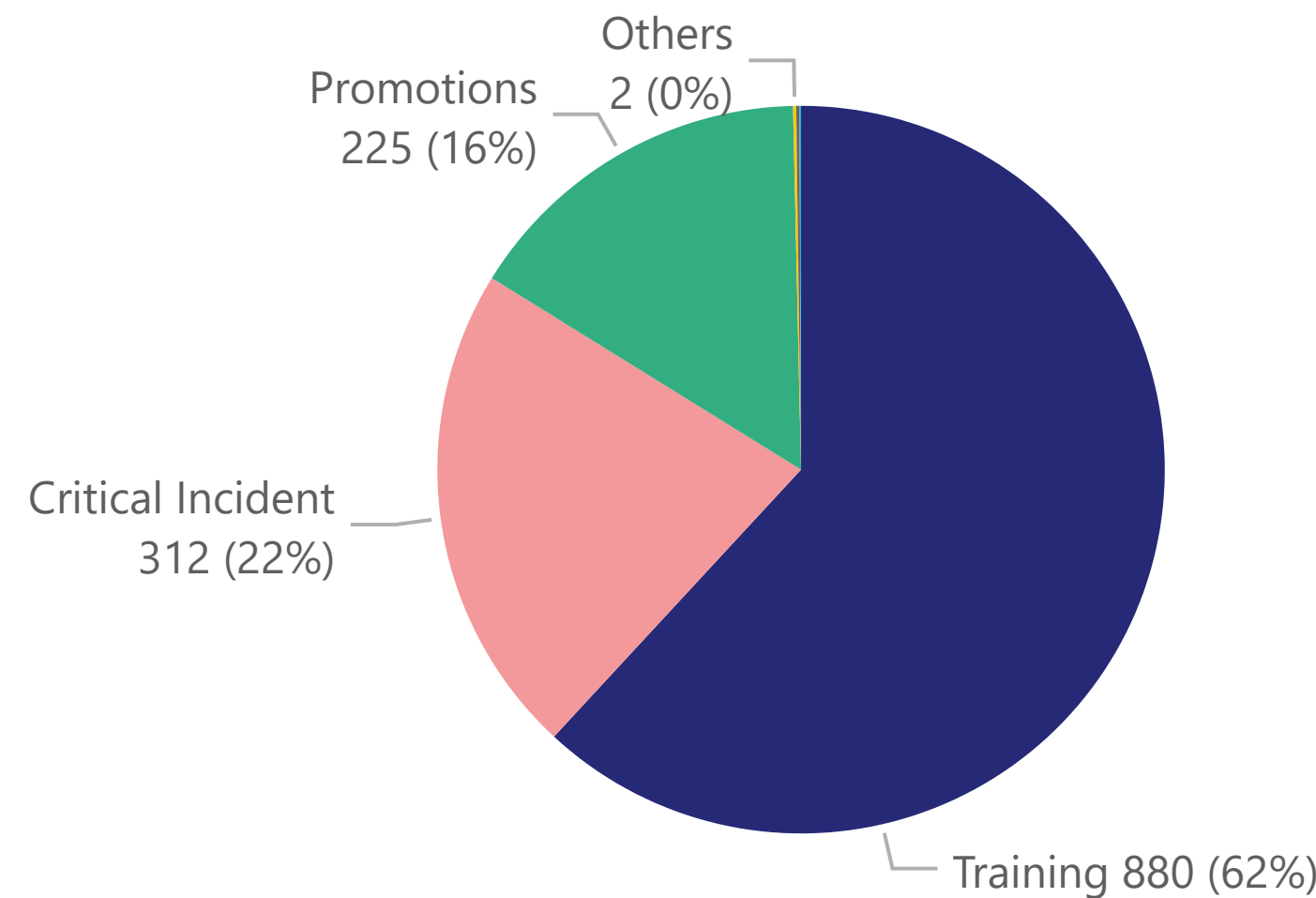
Workplace Subtypes - Details



Top 10 Entities

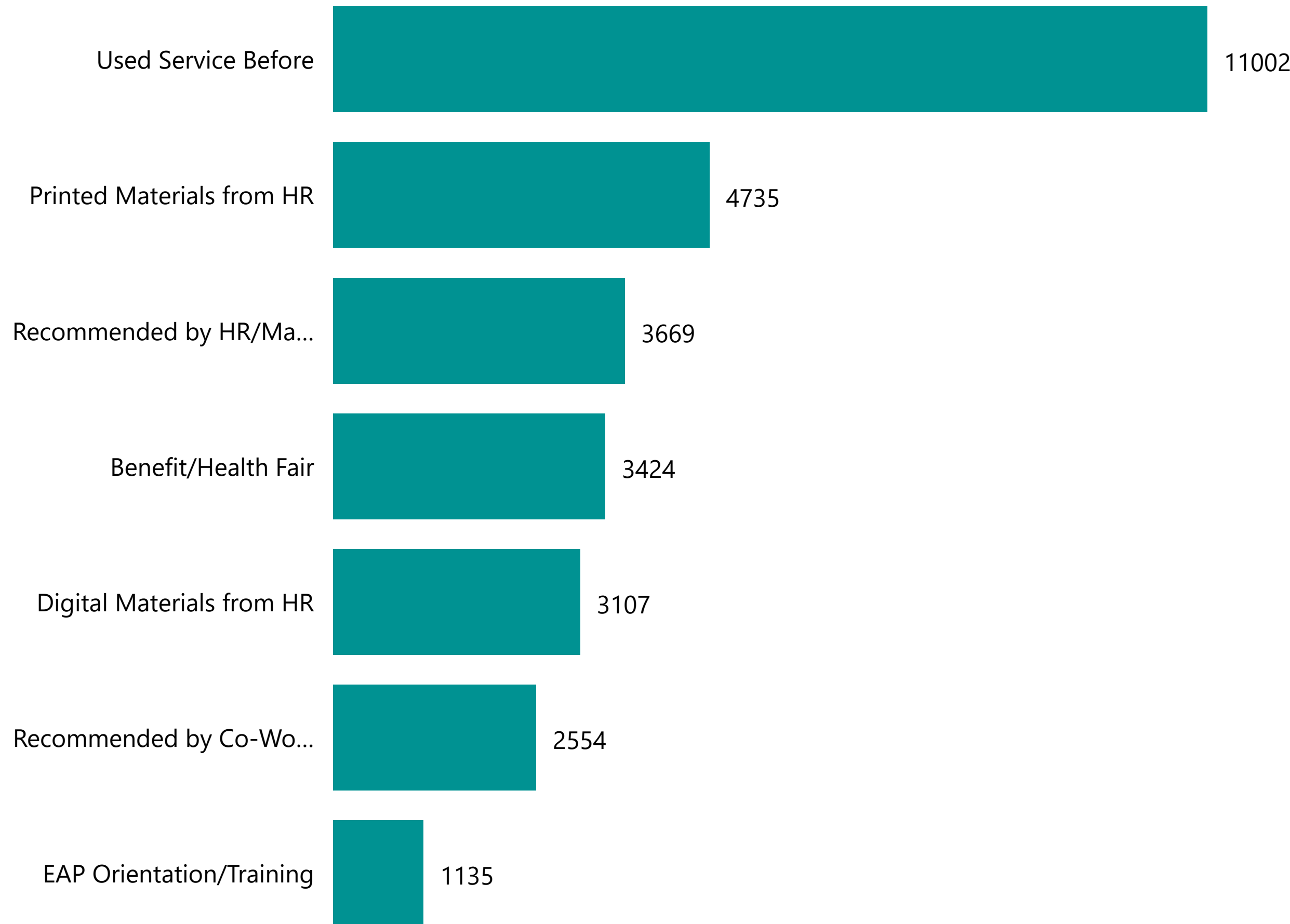


Workplace Activities Details

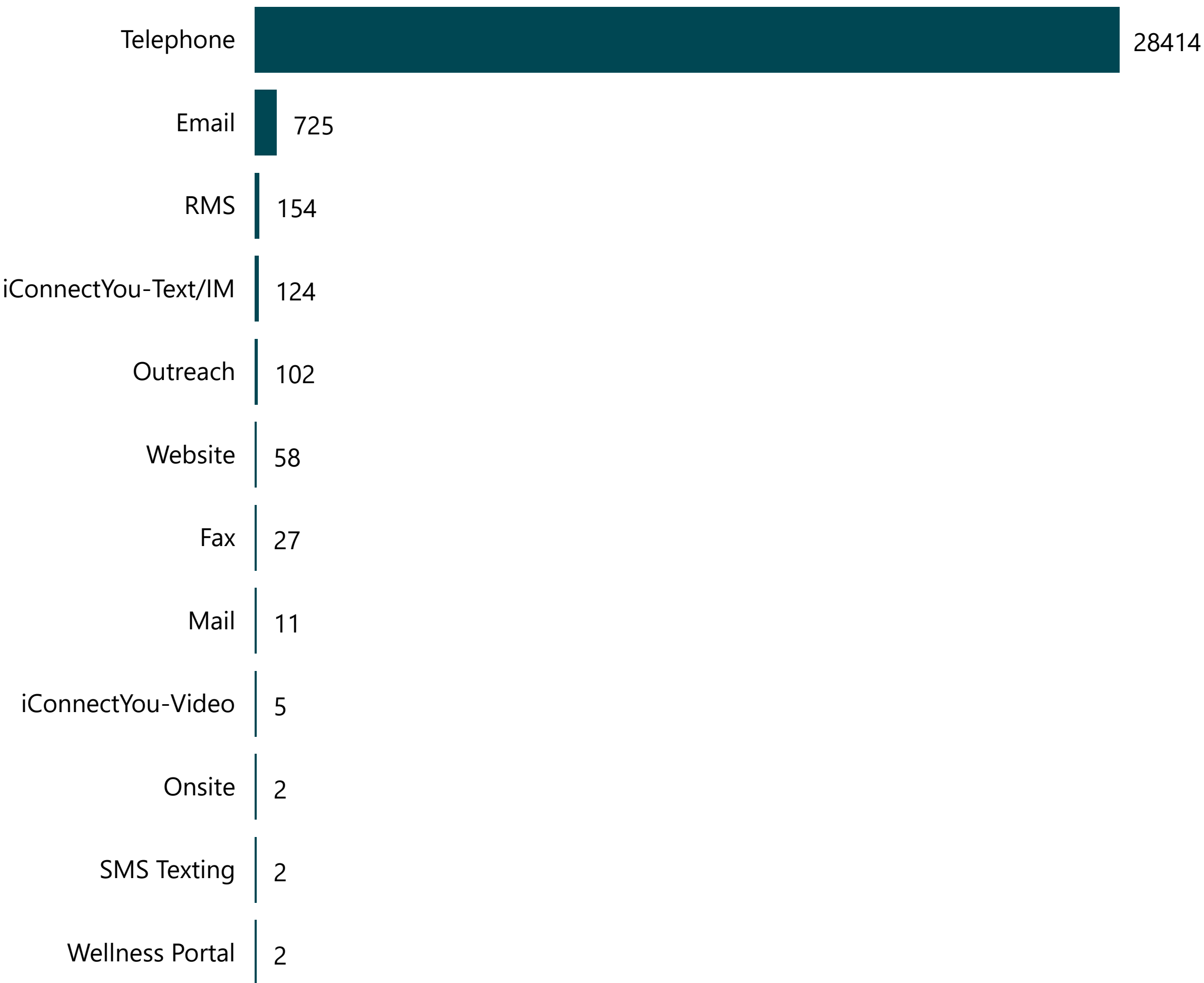




Knowledge of Service



Method Of Contact





Report Terminology Glossary

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

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

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

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

Advantage Website:
Used to assist participants with issues, access and information on their EAP website.

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

Clinical Assessment:
There may be times in which a Clinical conversation takes place, but the call did not result in referral or SST.

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

Average Sessions per case:
It is calculated number of completed sessions by completed cases within that time period. Those sessions are distributed by clinical services – Video, STC, SST, Face to Face and others(Aware, cCBT, Elevate, Online counselling etc)

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

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

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

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

Others:
Others include services like cCBT, Pathways, Aware, etc.

Overall Utilization:
Utilization is calculated differently for Clinical and Work-Life/Wellness

For [Clinical](#): $\text{Number of unique cases} \div \text{population on that period} \times 100$

For [Work-life](#) and [Wellness](#): $\text{Number of Presenting issues} \div \text{population on that period} \times 100$

Projected Utilization is calculated with the following formula:
$$\text{Utilization for the Period} \div \text{Total number of days in that period} \times 365 \times 100$$

Utilization calculations are rounded to the nearest hundredth decimal place.

**When an organization's population is less-than (<) 100 employees, some data tables and sections will be suppressed in order to protect Participant confidentiality, including the following:*

- [Caller Information](#)
- [Main Issues](#)
- [Clinical Cases by Category](#)
- [Top Concerns](#)
- [Work-Life Cases by Category](#)

RMS (formally Live Connect):
Instant messaging that is accessible via the website. Allows participant to request services without making a phone call

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

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

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

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

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

